

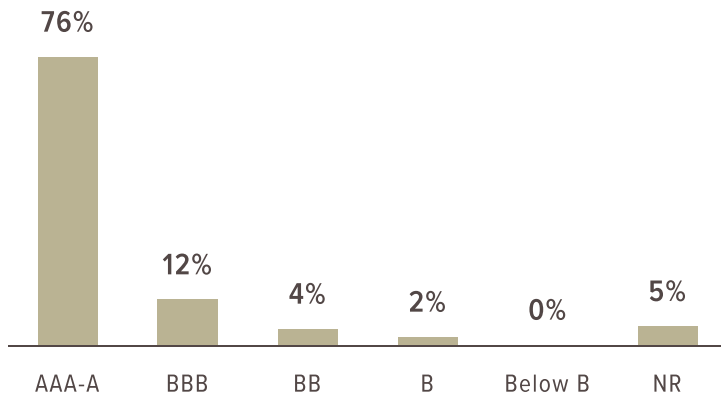
The Approach

The Short Duration Portfolio seeks to generate current income by investing in a diversified set of low duration ETFs with exposures to various currencies, term structures, issuers, collateralization structures and economic sectors. The portfolio is also diversified globally among both developed and emerging market countries.

The Features

The investment objective of the portfolio is capital preservation with a secondary goal of current income. The portfolio has a flexible mandate, with no constraints on credit quality, duration, geographic region or issuers.

Credit Quality

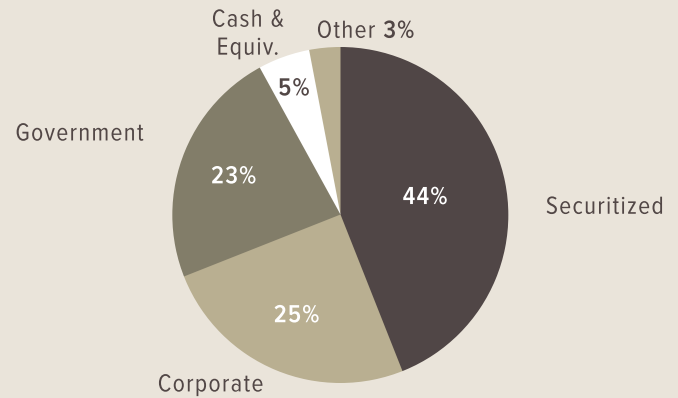


Key Facts

Assets Managed — \$85 Million
 Holdings — 10
 Min Investment — \$10,000

Allocation

*May not sum to 100 due to rounding.



Top 5 Holdings (% weight)

JPMorgan Short Duration Core Plus ETF	15.0%
JPMorgan Limited Duration Bond ETF	15.0%
iShares Flexible Income ETF	11.9%
Vanguard Short Term Treasury ETF	10.0%
Eaton Vance Short Duration Income ETF	10.0%

Source: Addepar as of Mar. 2025; Morningstar as of Mar. 2025

Morningstar Portfolio Dates: 2/28/2025 - VGSH; 4/8/2025 - BINC, NEAR; 4/10/2025 - EVSD, GSST, JPLD, JSCP, VRIG; 4/11/2025 - CLOI, SDSI

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