

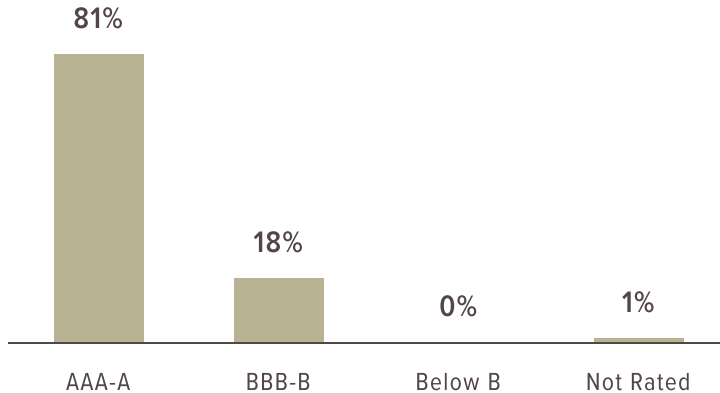
The Approach

The Short Duration portfolio seeks to generate current income by investing in a diversified set of low duration mutual funds 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.

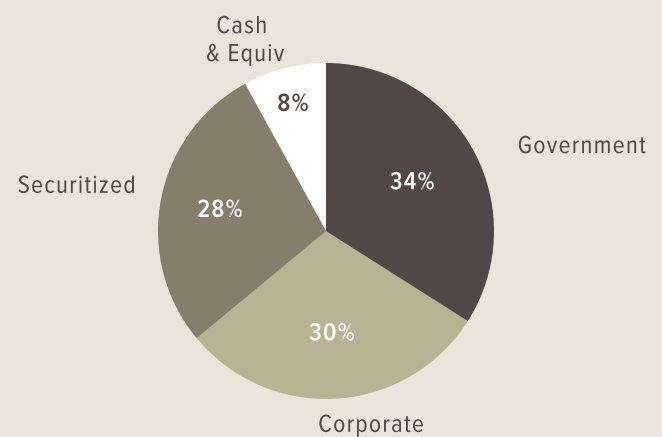
Credit Quality



Key Facts

| | |
|--------------------|--|
| Assets Managed | — \$126 Million |
| Holdings | — 8 |
| Current Yield | — 1.2% |
| Effective Duration | — 1.2 |
| Min Investment | — \$10,000 |
| Benchmark | — Barclays US Aggregate 1-3 Year Index |

Allocation



Top 5 Holdings (%)

| | |
|--|-------|
| Vanguard Short Term Treasury ETF | 22.5% |
| Invesco Variable Rate Investment Grade ETF | 16.3% |
| Goldman Sachs Ultra Short Bond ETF | 15.9% |
| JP Morgan Ultra-Short Income ETF | 15.8% |
| First Trust Low Duration Opportunities ETF | 12.8% |

Source: 2020 Addepar; 2020 Morningstar

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