

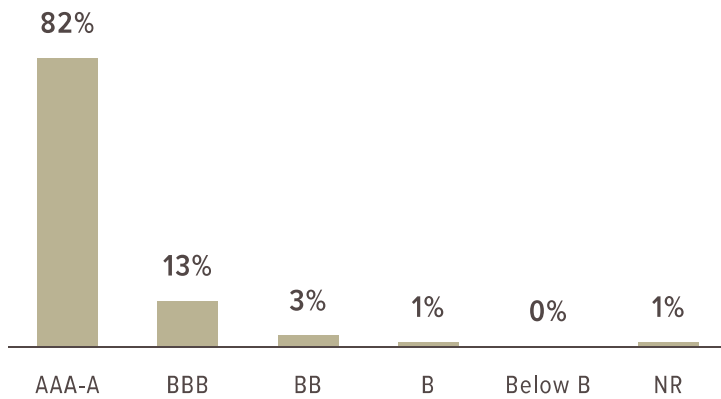
The Approach

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

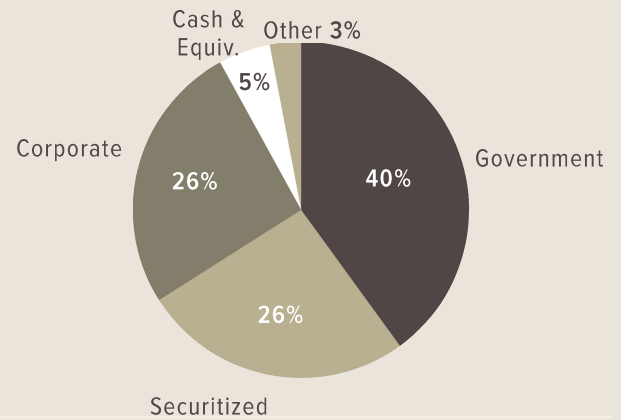
Assets Managed — \$94 Million

Holdings — 9

Min Investment — \$10,000

Allocation

*May not sum to 100 due to rounding.



Top 5 Holdings (% weight)

Invesco Variable Rate Investment Grade ETF	15.5%
JP Morgan Short Duration Core Plus ETF	14.9%
Vanguard Short Term Treasury ETF	14.8%
iShares US Short Duration Bond ETF	9.8%
Janus Henderson Short Duration Income ETF	9.8%

Source: Addepar as of Sept. 2024; Morningstar as of Sept. 2024

Morningstar Portfolio Dates: 8/31/2024 - VGSH; 10/7/2024 - NEAR; 10/9/2024 - BINC, STIP; 10/10/2024 - GSST, JSCP, LDUR, VRIG; 10/11/2024 - VNLA

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