

Zuma Wealth Strategies

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High Growth

- Maximum participation in rising and recovering markets
- Cuts bear market exposure
- 80-100% stocks/0-20% bonds
- Expected return of 9-10%
- Expected standard deviation of 14.1%
- Suitable for investors seeking long-term investment returns and willing to ride out short-term fluctuations

Growth

- Participation in rising and recovering markets
- Cuts impact of large declines and bear markets
- 60-80% stocks/20-40% bonds
- Expected return of 7-9%
- Expected standard deviation of 11.5%
- Suitable for investors seeking long-term growth and comfortable with the ups and downs of stock and bond markets

Moderate

- Moderate gains in rising and recovering markets
- Guards against moderate losses and bear markets
- 40-60% stocks/40-60% bonds
- Expected return of 6-8%
- Expected standard deviation of 9.3%
- Suitable for investors seeking investment growth without big losses

Income

- Income-driven absolute return and designed to preserve wealth in most markets
- Reduces worries of rising interest rate risk
- Expected return of 4-6%
- Expected standard deviation of 6.1%
- Suitable for investors seeking absolute return and income

