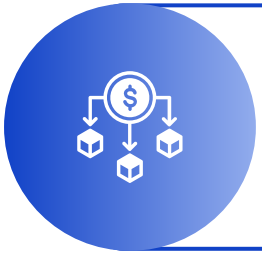
THE POWER OF PROCESS

A well-designed approach to investing is built on a disciplined process that balances risk and reward through careful diversification, strategic asset allocation, and regular rebalancing.

By focusing on composition, correlation, and rebalancing, your plan ensures resilience during market shifts while staying aligned with your long-term goals.

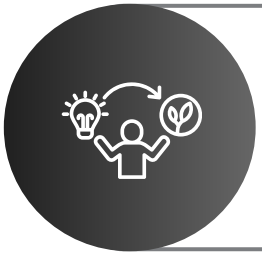
DIVERSIFICATION MATTERS

A well-constructed portfolio spreads risk by avoiding over-concentration. Think of it as not putting all your eggs in one basket to enhance stability and reduce volatility.



DIVERSIFY SMARTLY

Properly diversified assets don't always move in the same direction. Winners and losers rotate year over year, so having the right mix ensures your portfolio remains balanced and resilient through market cycles.



STAY DISCIPLINED

Regularly rebalancing your portfolio helps you stay on track, capitalizing on opportunities to buy low and sell high while maintaining alignment with your financial goals.

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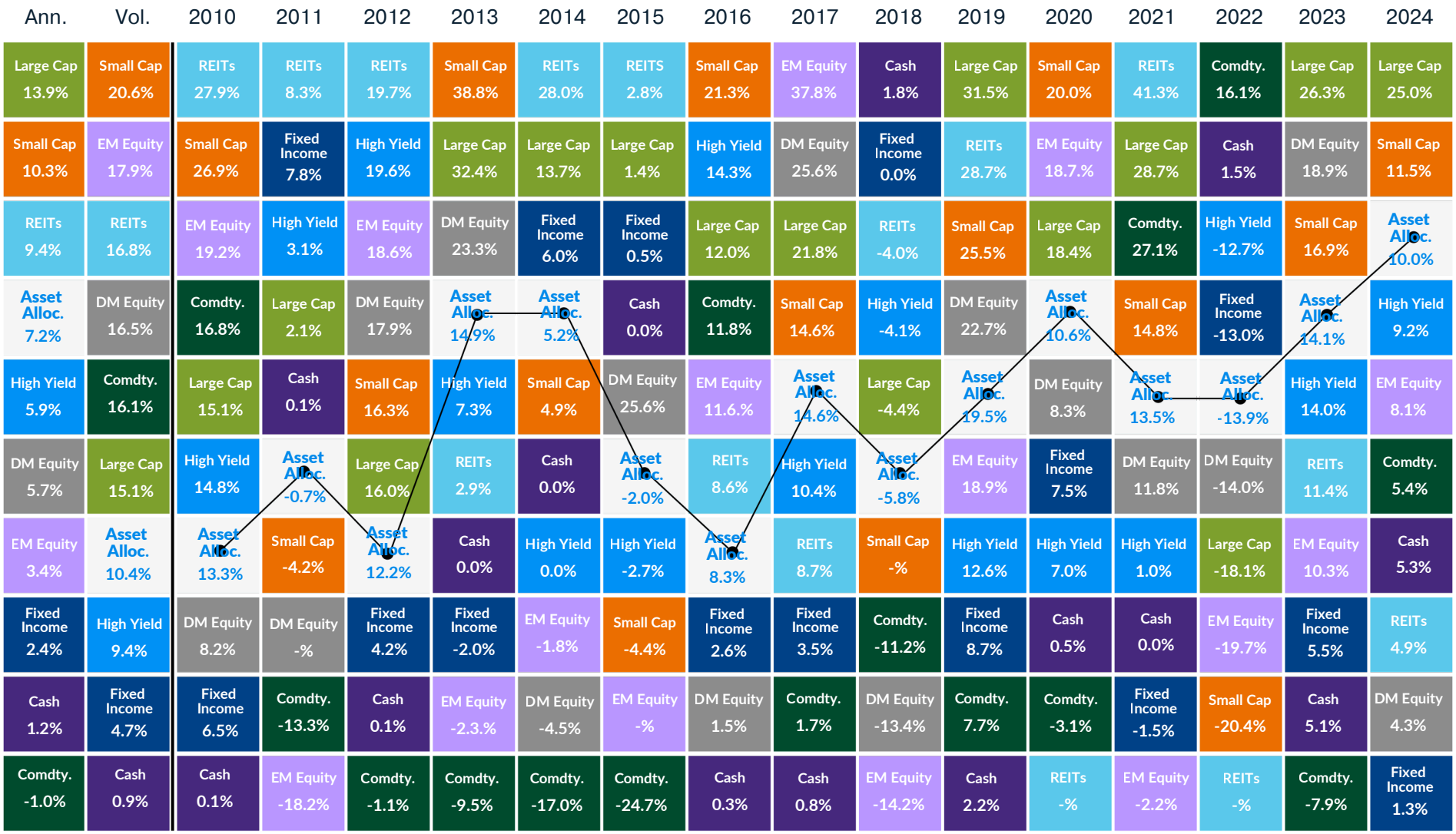
ASSET CLASS RETURNS

2010-2024



Source: Bloomberg, FactSet, MSCI, NAREIT, Russell, Standard & Poor's, J.P. Morgan Asset Management

Investment Advisory Services offered through Alphastar Capital Management, LLC, an SEC Registered Investment Adviser. SEC registration does not constitute an endorsement of the firm by the Commission, nor does it indicate that the adviser has attained a particular level of skill or ability. Large cap: S&P 500, Small cap: Russell 2000, EM Equity: MSCI EME, DM Equity: MSCI EAFE, Comdty: Bloomberg Commodity Index, High-Yield: Bloomberg Global HY Index, Fixed Income: Bloomberg U.S. Aggregate, REITs: NAREIT Equity REIT Index, Cash: Bloomberg 1-3m Treasury. The "Asset Allocation" portfolio assumes the following weights: 25% in the S&P 500, 10% in the Russell 2000, 15% in the MSCI EAFE, 5% in the MSCI EME, 25% in the Bloomberg U.S. Aggregate, 5% in the Bloomberg 1-3m Treasury, 5% in the Bloomberg Global High Yield Index, 5% in the Bloomberg Commodity Index and 5% in the NAREIT Equity REIT Index. Balanced portfolio assumes annual rebalancing. Annualized (Ann.) return and volatility (Vol.) represents period from 12/31/2009 to 12/31/2024. All data represents total return for stated period. The "Asset Allocation" portfolio is for illustrative purposes only. Past performance is not indicative of future returns.

Data are as of December 31, 2024

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