



Inspire Select Asset Class Models

PLATFORM

Select (55bps)

RISK PROFILE

Aggressive

STRATEGY TYPE

Asset Class Models

ALLOCATION

100% Equity; U.S. large-, mid-, and small-cap asset class models each comprised of 40 individual stocks

OBJECTIVE

Targeted Exposure to a Particular Asset Class

The Inspire Select Asset Models each consist of a concentrated portfolio of 40 individual stocks representing a targeted segment of the global equity market, including U.S. large-, mid-, and small-cap companies, as well as International Developed and Emerging Markets large-cap companies. Securities are selected through a systematic evaluation of key investment characteristics designed to identify companies with attractive long-term investment potential. Each model is intended to complement a broader investment portfolio by providing focused exposure to a specific segment of the U.S., International, or Emerging Markets equity markets, rather than serving as a standalone investment strategy. The models are managed using a disciplined, rules-based investment process and are rebalanced at the beginning of each calendar quarter to maintain alignment with their investment methodology and stated investment objectives.

ASSET CLASS MODELS

Inspire Select Emerging Markets
Inspire Select International
Inspire Select US Large Cap
Inspire Select US Mid Cap
Inspire Select US Small Cap

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These strategies are model allocations and may not reflect actual client portfolios. Allocations are subject to change and may vary.