



Inspire Select Core/Satellite Opportunities 70/30 Strategy

PLATFORM

Select (55bps)

OBJECTIVE

**Capital Appreciation
and Income**

STRATEGY TYPE

Active Allocation Model

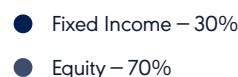
RISK PROFILE

Moderate

ALLOCATION

70% Equity / 30% Fixed Income; exposure to large, mid, and small-cap US, international developed, and emerging markets equities and large-cap US investment-grade corporate bonds

The Inspire Select Core/Satellite Opportunities 70/30 Strategy is an actively managed portfolio that combines a diversified core equity allocation with a tactical satellite component designed to capitalize on attractive opportunities across select market sectors. The strategy maintains a strategic allocation of approximately 70% to equities and 30% to fixed income, seeking to balance long-term growth potential with income generation and risk management. The core equity allocation, composed primarily of individual stocks, provides broad exposure to a globally diversified universe of U.S. large-, mid-, and small-cap stocks, as well as developed and emerging international markets. These allocations are guided by long-term capital market assumptions established by Inspire's Investment Committee. Complementing this core exposure, the strategy allocates a portion of the portfolio to one to three sector sleeves composed of 10 stocks each, allowing for opportunistic positioning in areas of the market identified as having favorable risk-return characteristics by technical indicators. The fixed income allocation consists primarily of large-cap U.S. investment-grade corporate bonds, providing portfolio stability and diversification benefits. The portfolio is systematically rebalanced at the beginning of each calendar quarter to maintain alignment with its strategic targets and implement any adjustments to the sector allocations, ensuring the portfolio remains positioned in accordance with its investment objectives and market outlook.



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