



Inspire Select Tactical Risk Management Strategy

PLATFORM

Select (55bps)

STRATEGY TYPE

Active Allocation Model

OBJECTIVE

**Risk-Mitigated Capital
Appreciation and
Capital Preservation**

RISK PROFILE

Conservative

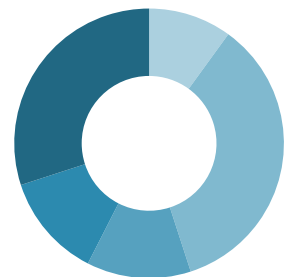
ALLOCATION

**100% Equity when Risk-On; 50% Equity / 50% Fixed
Income when Neutral; 100% Fixed Income when
Risk-Off**

The Inspire Select Tactical Risk Management Strategy is an actively managed, risk-mitigation strategy designed to dynamically adjust market exposure based on technical indicators. The strategy shifts among three distinct positioning states – risk-on, risk-off, and neutral – to manage downside risk while participating in long-term market growth. In a risk-on environment, the portfolio maintains broad exposure to a globally diversified equity universe, including U.S. large-, mid-, and small-cap stocks, as well as developed and emerging international markets. These allocations are informed by long-term capital market assumptions established by Inspire’s Investment Committee. During risk-off periods, the strategy seeks capital preservation by allocating entirely to large-cap U.S. investment-grade corporate bonds. In a neutral environment, the portfolio adopts a balanced approach, allocating 50% to the risk-on allocation and 50% to the risk-off allocation. The portfolio is systematically rebalanced at the beginning of each calendar quarter to maintain alignment with its strategic targets. In addition, allocations may be adjusted intra-quarter when technical indicators signal a change in the portfolio’s risk posture.

Risk On

- Emerging Markets Sleeve – 10%
- International Sleeve – 35%
- US Small Cap Sleeve – 12.5%
- US Mid Cap Sleeve – 12.5%
- US Large Cap Sleeve – 30%



Risk Off

- Inspire Corporate Bond ETF (IBD) – 100%



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