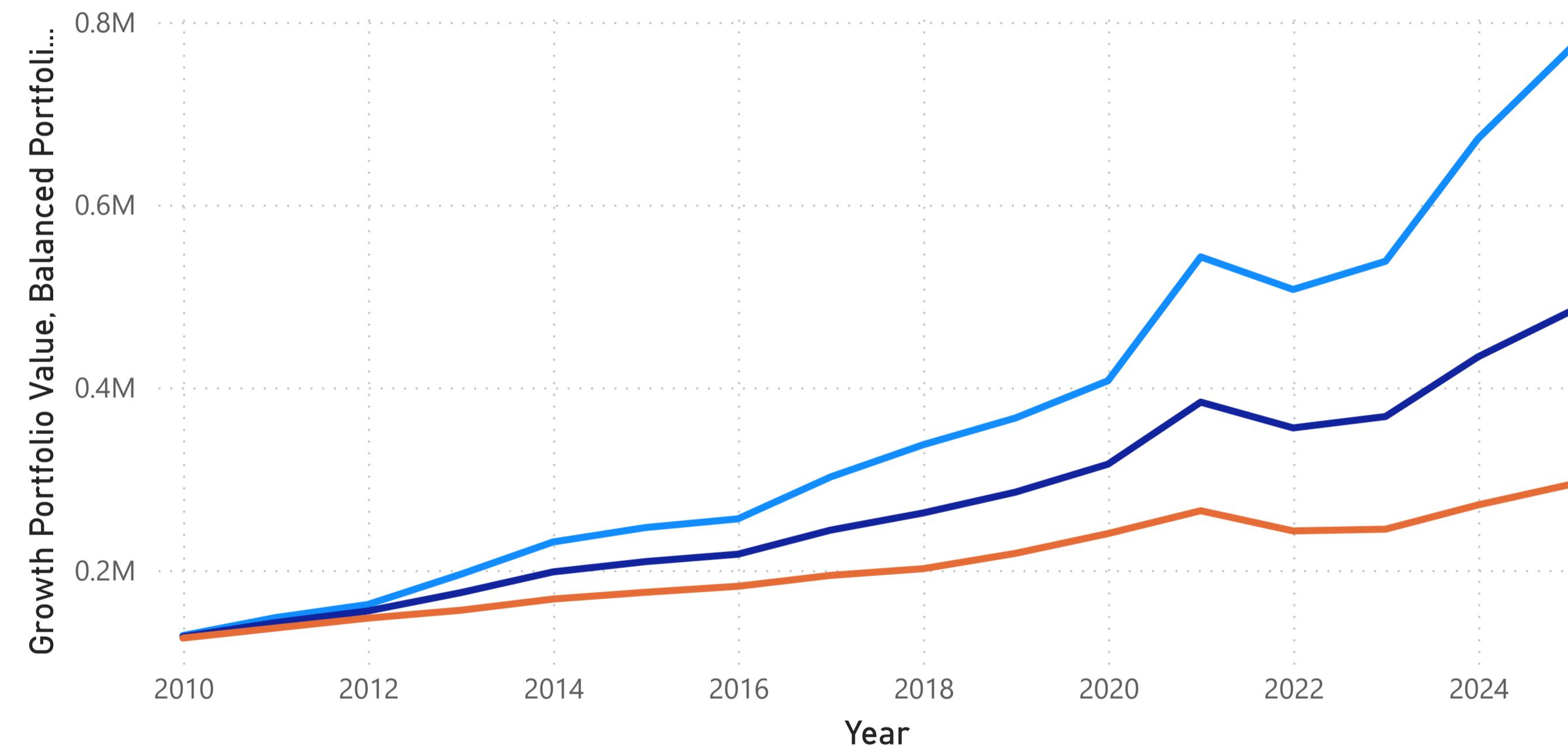


Growth Portfolio Value, Balanced Portfolio Value and Preservation Portfolio Value by Year

● Growth Portfolio Value ● Balanced Portfolio Value ● Preservation Portfolio Value





CAGR (Annualized Return)

Growth CAGR

12.99%

Growth CAGR

Balanced CAGR

9.58%

Balanced CAGR

Preservation CAGR

6.07%

Preservation CAGR



Volatility

13.66%

Growth Volatilty

9.68%

Balanced Volatility

6.20%

Preservation Volatility



Max Drawdown

-23.80%

Growth Max_Drawdown

-20.60%

Balanced Max_Drawdown

-17.42%

Preservation Max_Drawdown



Worst Monthly Return

-13.03%

Growth Worst_Monthly_Return

-9.16%

Balanced Worst_Monthly_Return

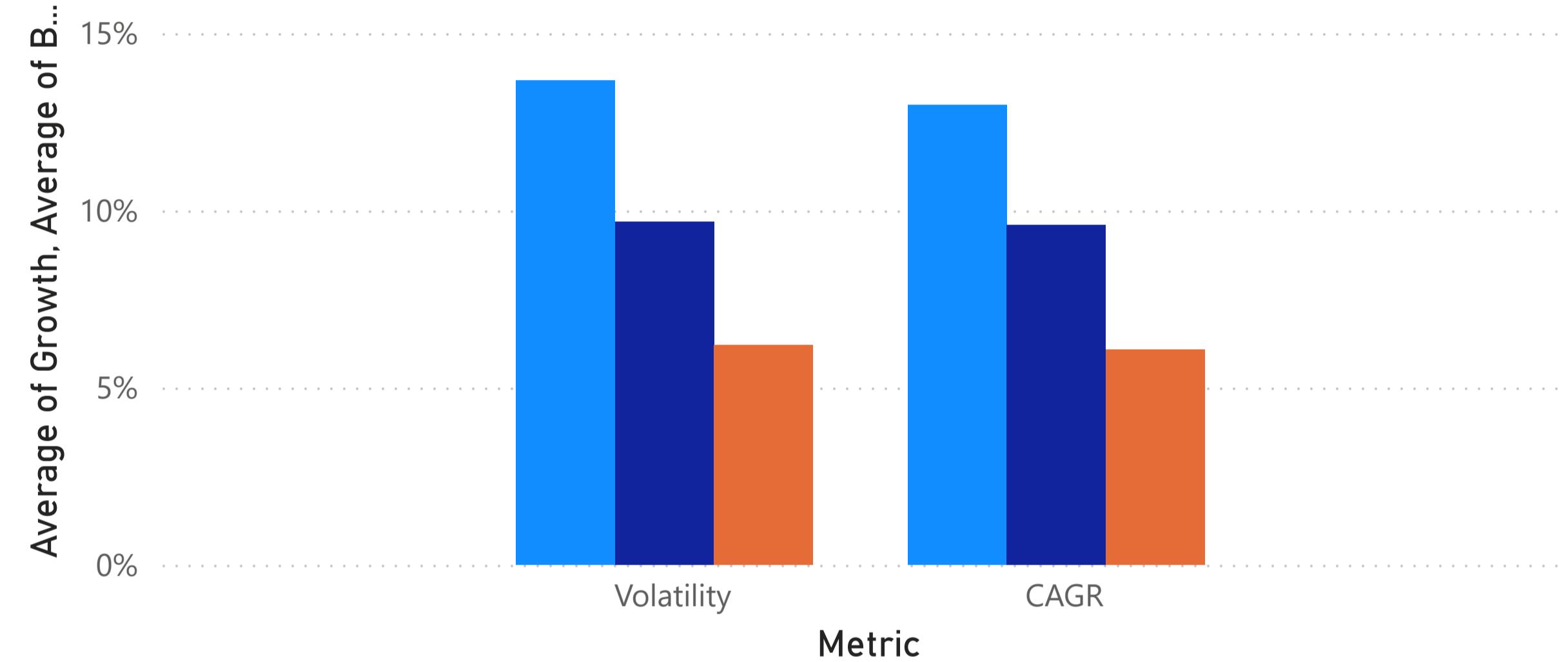
-5.82%

Preservation Worst_Monthly_Return



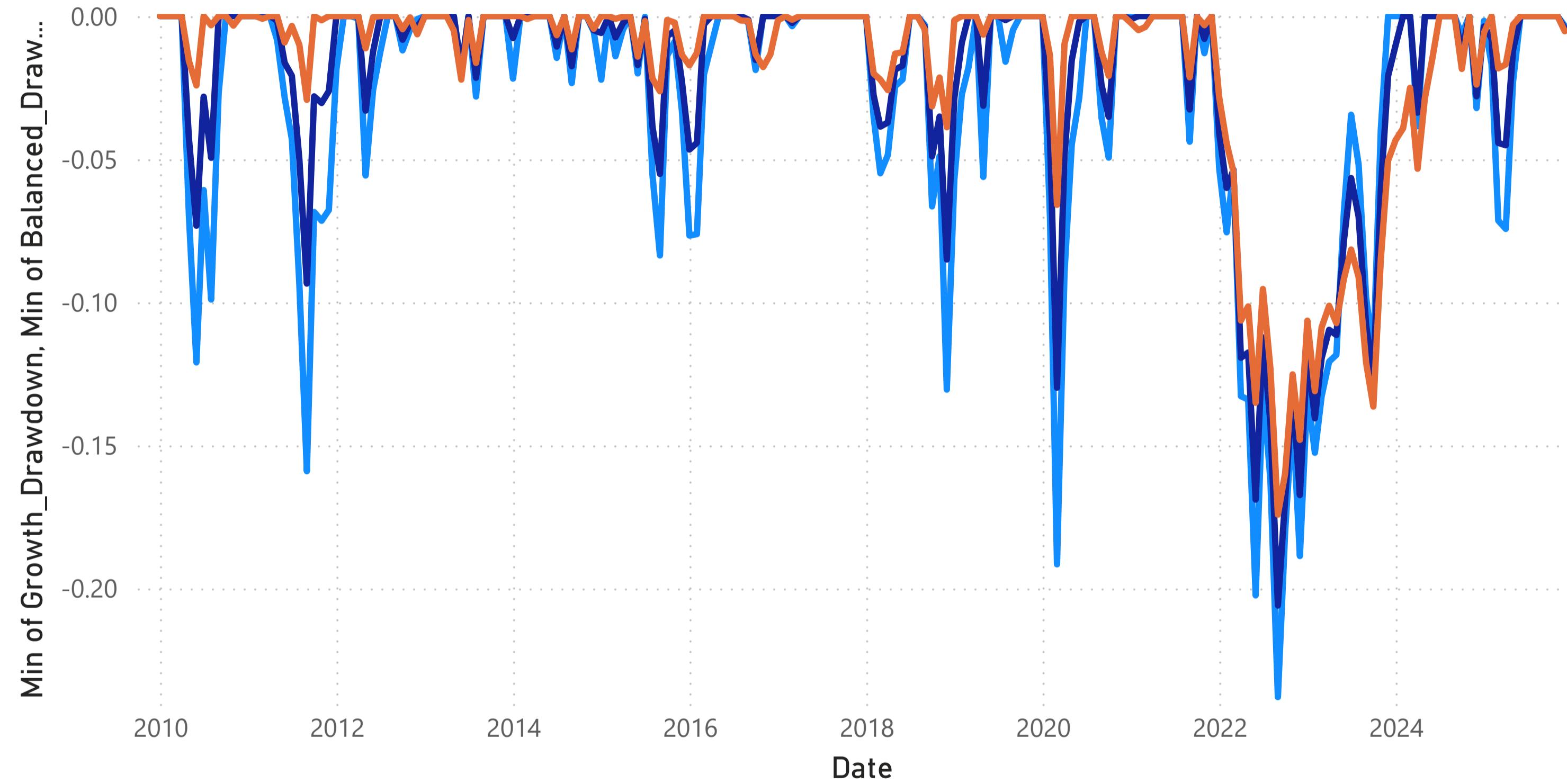
Risk vs Return: CAGR and Volatility

● Average of Growth ● Average of Balanced ● Average of Preservation



Portfolio Drawdowns Over Time

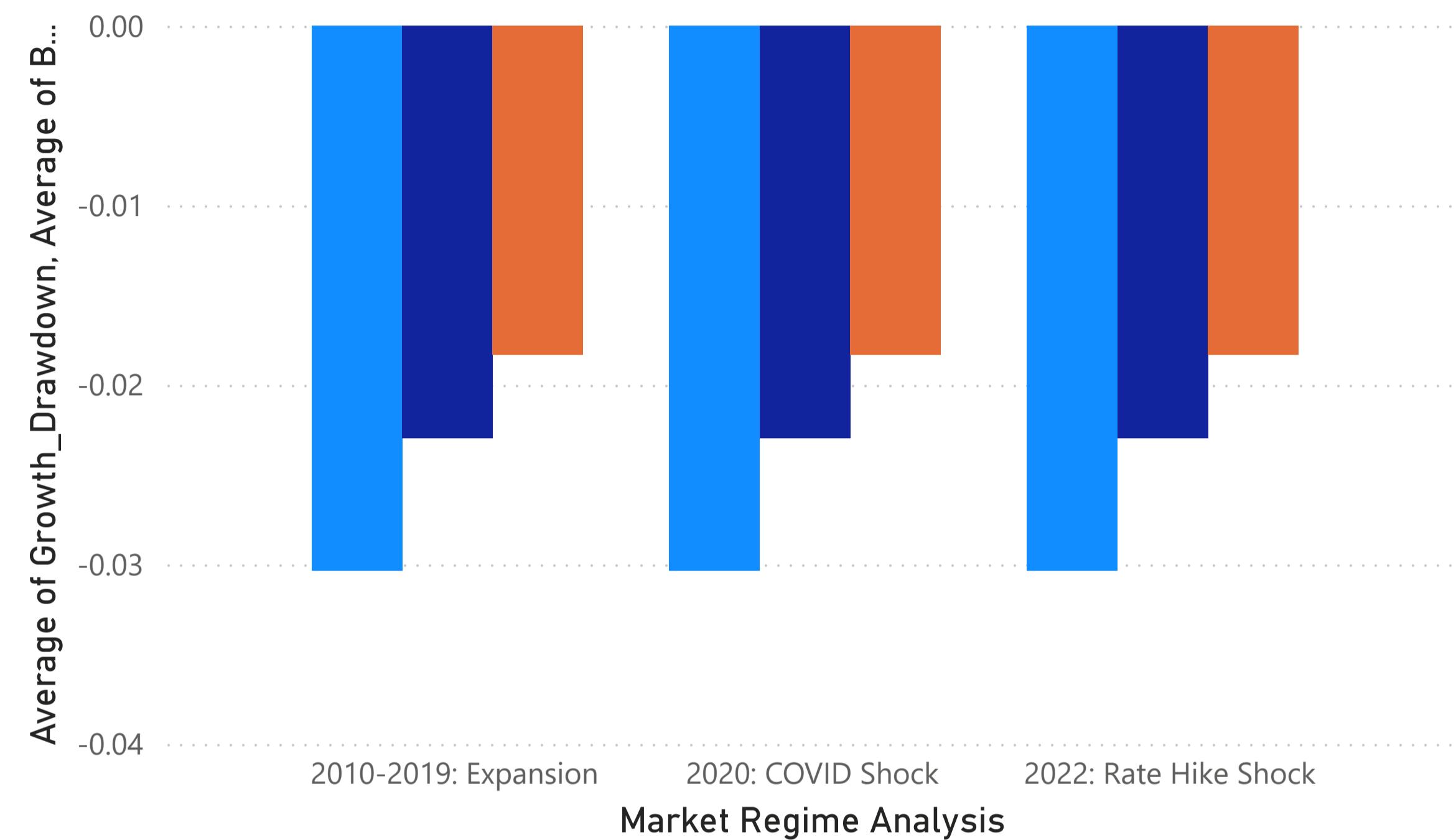
● Min of Growth_Drawdown ● Min of Balanced_Drawdown ● Min of Preservation_Drawdown





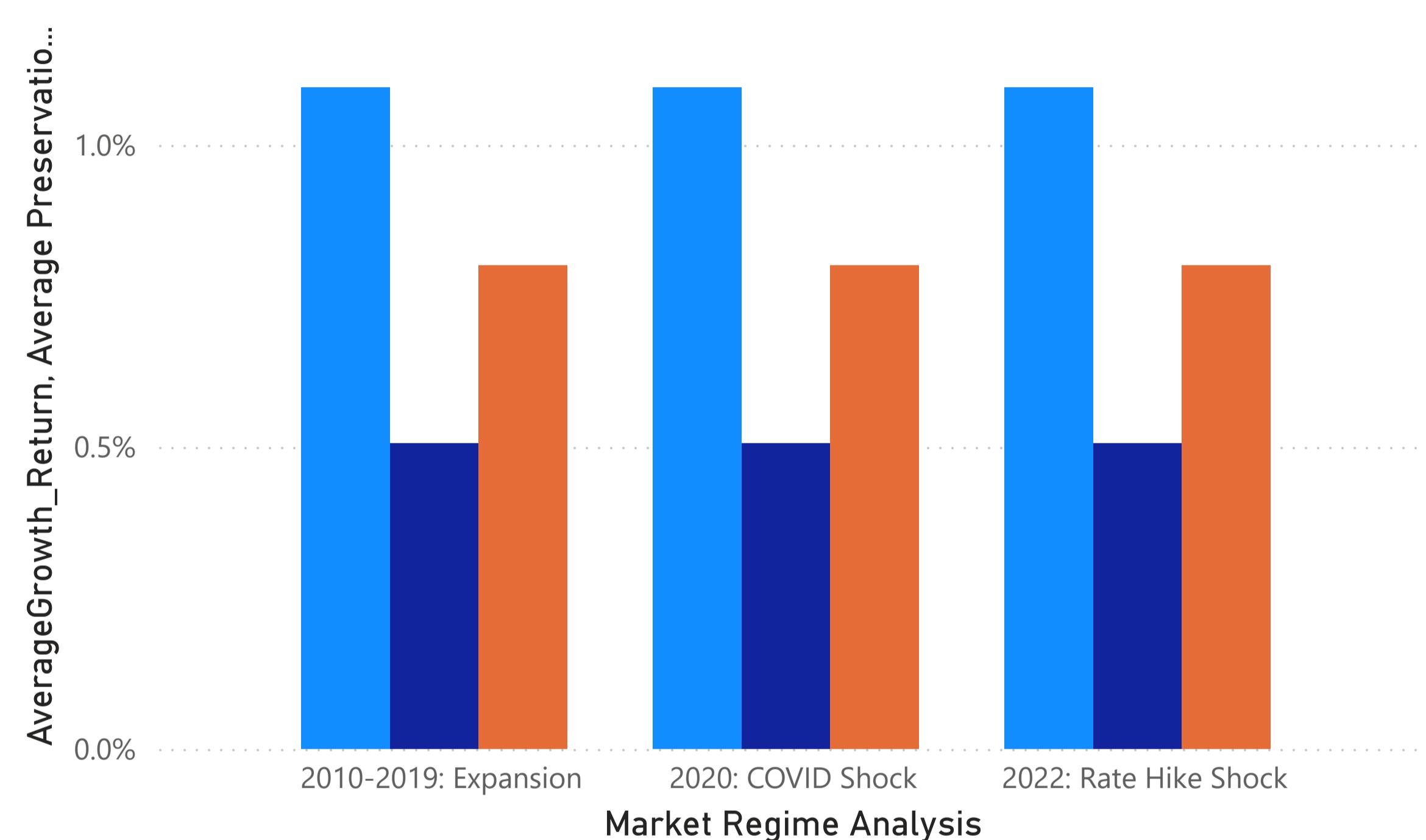
Average Drawdown by Market Regime

● Average of Growth_Drawdown ● Average of Balanced_Drawdown ● Average of Preservation...



Average Returns by Regime

● AverageGrowth_Return ● Average Preservation_Return ● AverageBalanced_Return





Growth Portfolio Cards

Growth – CAGR

12.99%

Average of Growth

Growth – Volatility

13.66%

Average of Growth

Growth – Max Drawdown

-23.80%

Average of Growth

Portfolio Insights & Recommendation

Growth Portfolio

- Delivers the highest long-term returns (CAGR)
- Experiences the highest volatility and deepest drawdowns
- Best suited for investors with long time horizons and high risk tolerance

Balanced Portfolio

- Offers strong returns with meaningfully lower risk
- Exhibits the most attractive risk–return tradeoff
- Suitable for most long-term investors

Preservation Portfolio

- Prioritizes capital protection over growth
- Lowest volatility and drawdowns
- Appropriate for conservative investors or short-term goals

Balanced Portfolio Cards

Balanced- CAGR

9.58%

Average of Balanced

Balanced - Volatility

9.68%

Average of Balanced

Balanced- Max Drawdown

-20.60%

Average of Balanced

Preservation Portfolio Cards

Preservation - CAGR

6.07%

Average of Preservation

Preservation - Volatility

6.20%

Average of Preservation

Preservation - Max Drawdown

-17.42%

Average of Preservation