



Goal planning

Whether you're saving for retirement, a down payment, or just investing for later, we'll help you make a plan to tackle multiple goals.



Auto rebalancing

We'll rebalance your investments, which means adjusting your stock and bond funds on a quarterly basis, so your money is always invested how you want it to be.



Diversification*

Risk is real. That's why we'll diversify your portfolio so that your money is allocated across different kinds of financial investments.

Please input your name and age

Dan 40

Are you risk taking?

No

USD/CAD Exposure (please enter the proportion of USD)

0.5

Cash Requirement for Regime or Tail Hedge (please enter a percentage)

0.05

Sub Class Optimization

Choose an algorithm for equity class

Low Volatility (Risk Parity) × ▼

Choose an algorithm for credit class

Low Volatility (Risk Parity) × ▼

Choose an algorithm for PE class

Low Volatility (Risk Parity) × ▼



Choose an algorithm for total portfolio

Low Volatility (Risk Parity) × ▼

Advice for you

Hello Dan, based on your information, your recommended strategy is: Risk Parity for Equity, Risk Parity for Credit, and Risk Parity for PE. And your suggested total portfolio construction method is :Risk Parity

Download Your Report