

WELLS  
FARGO

ADVISORS

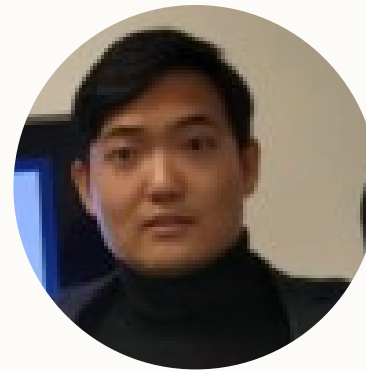
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## INVESTMENT MANAGEMENT ADVISORS

TEAM 07 | 15 December 2022



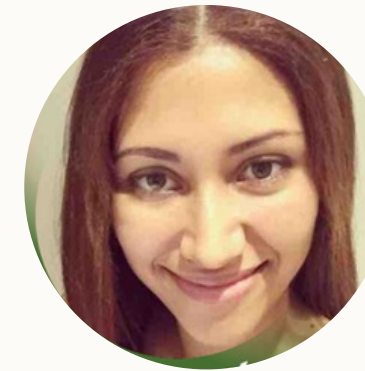
Won Seok  
Hur



Tatsuya  
Hashimoto

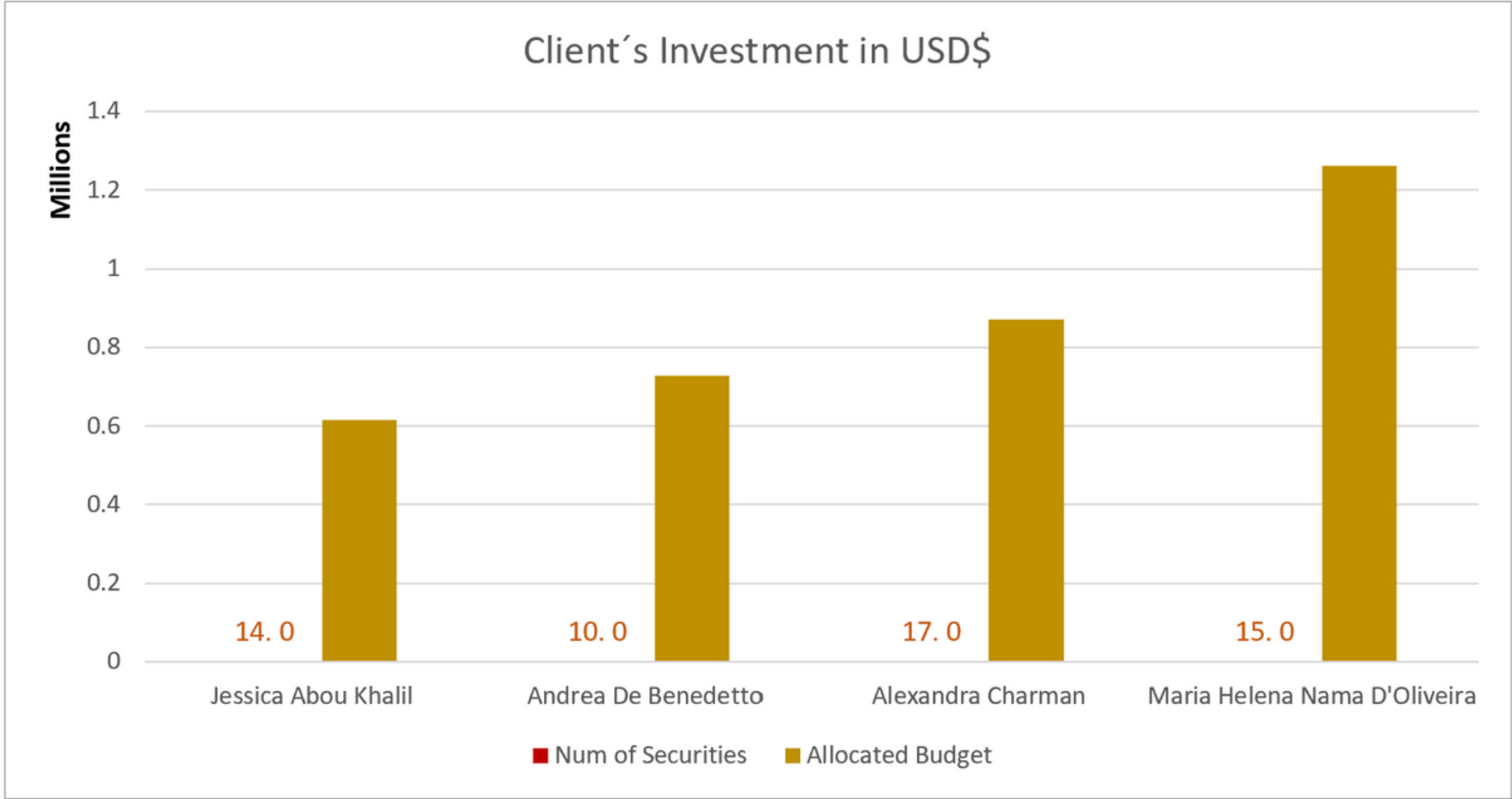


Meenakshi  
Menon



Catherine  
Garrido

# CLIENTS CHOSEN FOR THE CASE



JESSICA  
ABOU KHALIL



ANDREA DE  
BENEDETTO

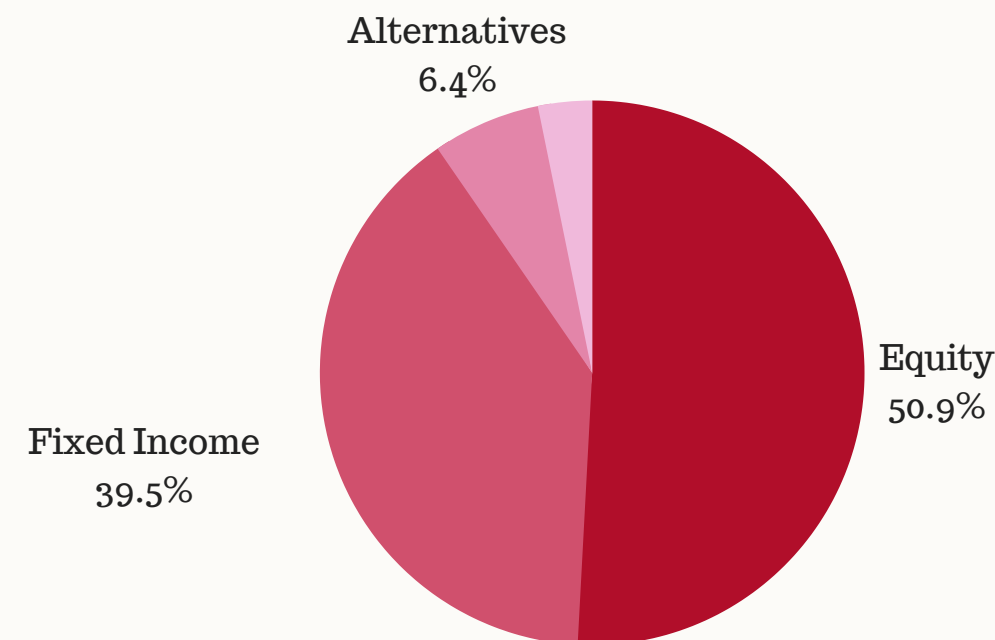


ALEXANDRA  
CHARMAN

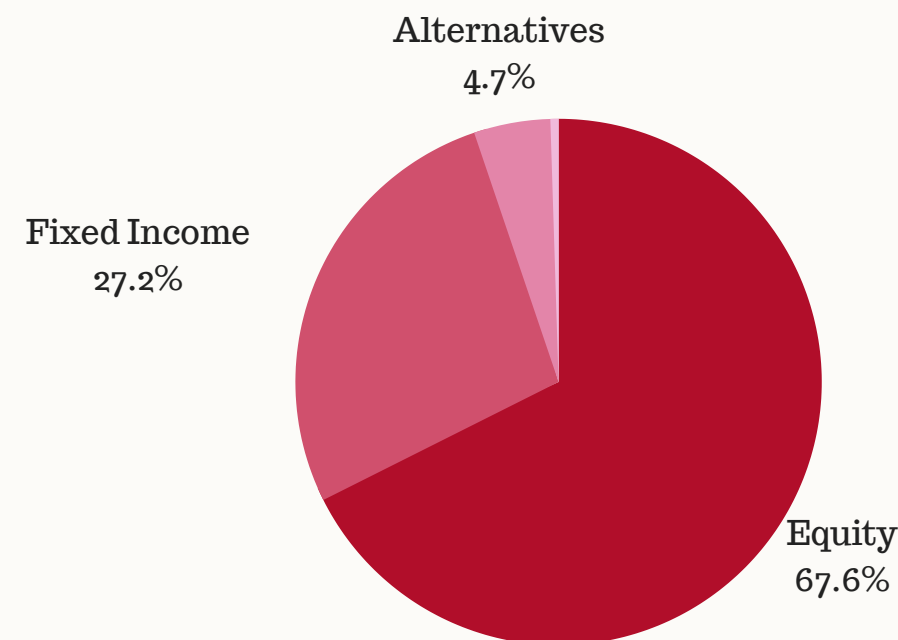


MARIA  
D'OLIVIERA

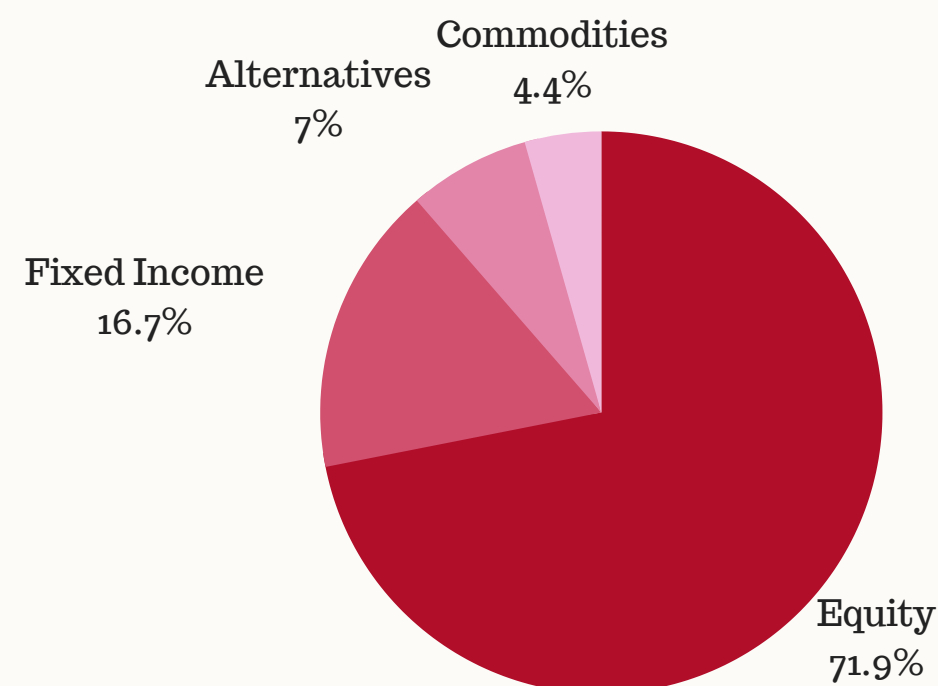
# THE ASSET DISTRIBUTION OF SECURITIES IS PROPORTIONAL WITHIN THE PORTFOLIOS



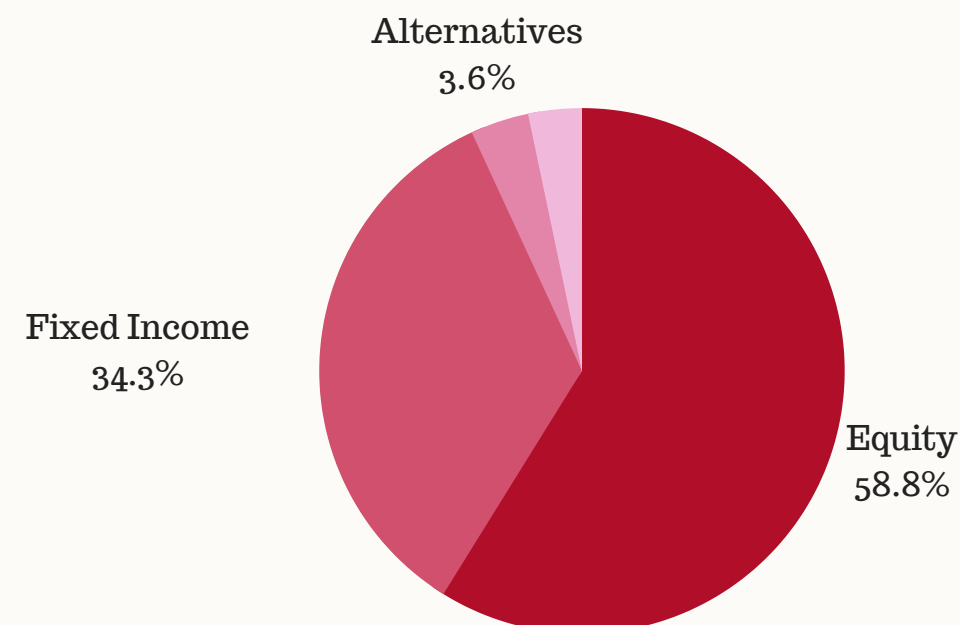
JESSICA  
ABOU KHALIL



ALEXANDRA  
CHARMAN



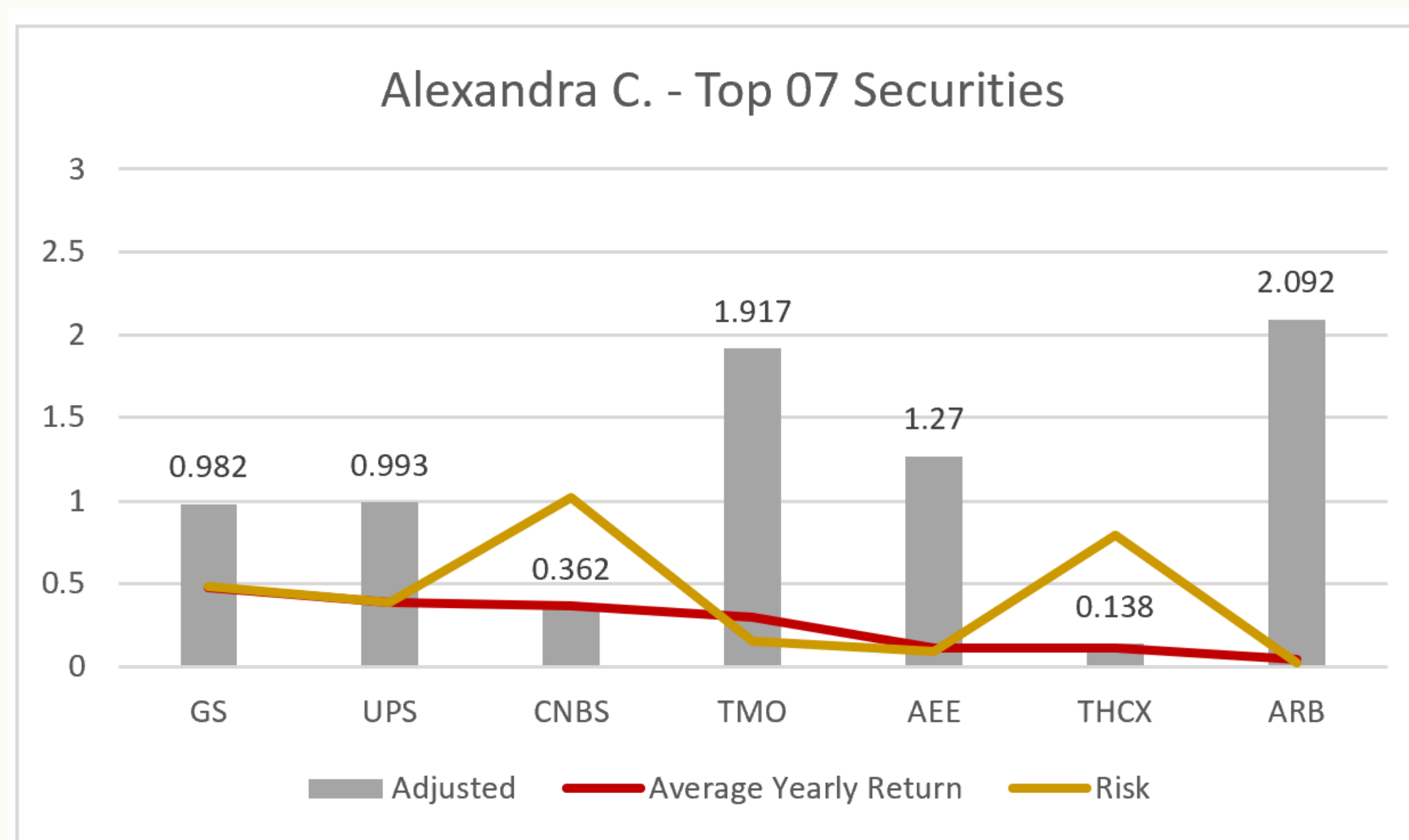
MARIA  
D'OLIVIERA



ANDREA DE  
BENEDETTO



# ALEXANDRA CHARMAN





# ALEXANDRA CHARMAN

Row Labels	Sum of adjusted_12	Sum of adjusted_18	Sum of adjusted_24
497	0.236	10.351	16.101
Alexandra Charman	0.236	10.351	16.101
ARB	2.092	2.825	8.252
GS	0.982	1.631	3.188
TMO	1.917	1.586	2.874
UPS	0.993	1.466	2.466
AEE	1.27	2.334	2.304
TIP	0.817	1.043	1.126
MARB	0.583	0.692	0.95
MNA	0.115	0.167	0.503
EOPS	-7.669	0	0
IGSB	-0.026	-0.017	-0.164
VTEB	0.02	0.063	-0.205
CNBS	0.362	0.254	-0.286
VCIT	-0.21	-0.21	-0.557
GIGB	-0.285	-0.264	-0.673
IUSB	-0.392	-0.419	-0.883
VGSH	-0.471	-0.594	-1.026
THCX	0.138	-0.206	-1.768

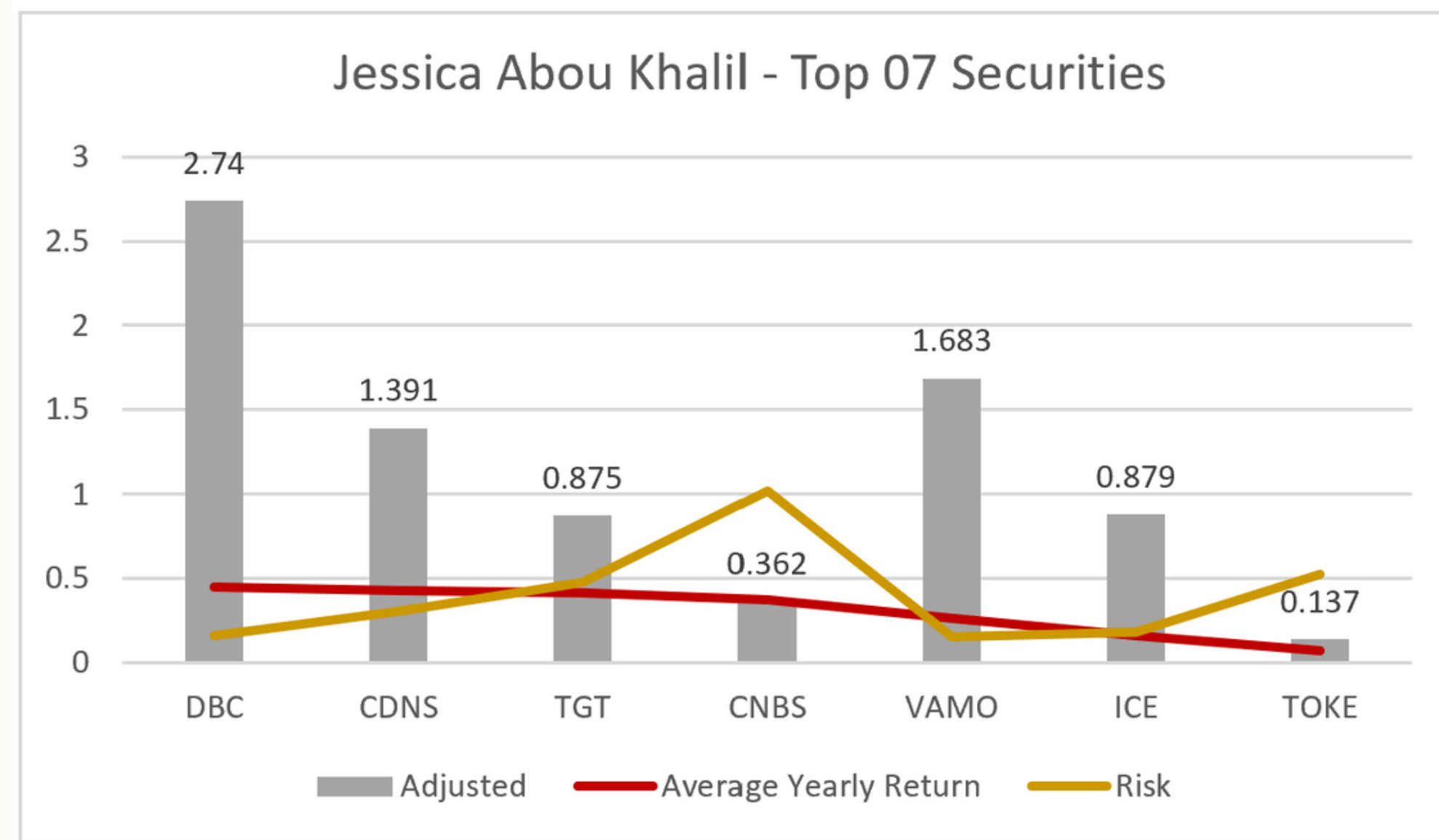
## INSIGHTS

Ticker (Replace to these)
VTIP
JPST
SCHB
BIL
VWO
ARB (increase the proportion)

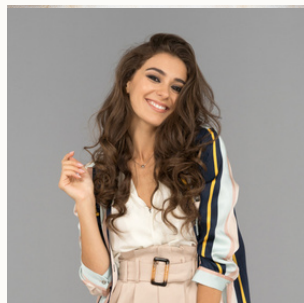
	12 M	18 M	24 M
Proposed Adjusted Return	0.27	0.42	0.48
Current Adjusted Return	0.26	0.41	0.46
Increase	1.0%	1.4%	1.9%



# JESSICA ABOU KHALIL







# JESSICA ABOU KHALIL

Row Labels	Sum of adjusted_12	Sum of adjusted_18	Sum of adjusted_24
740	7.587	9.418	10.437
Jessica Abou Khalil	7.587	9.418	10.437
VAMO	1.683	2.413	3.154
DBC	2.74	2.797	2.758
CDNS	1.391	1.536	2.66
MSVX	0.627	1.23	1.728
TGT	0.875	1.168	1.659
JPST	0.579	0.744	1.297
ICE	0.879	1.049	1.114
GLDM	0.242	0.348	0.582
MUB	0.006	0.047	-0.23
CNBS	0.362	0.254	-0.286
TOKE	0.137	-0.079	-0.683
BSV	-0.368	-0.448	-0.856
BND	-0.554	-0.581	-1.058
IEF	-1.012	-1.06	-1.402
Grand Total	12.84	31.144	45.053

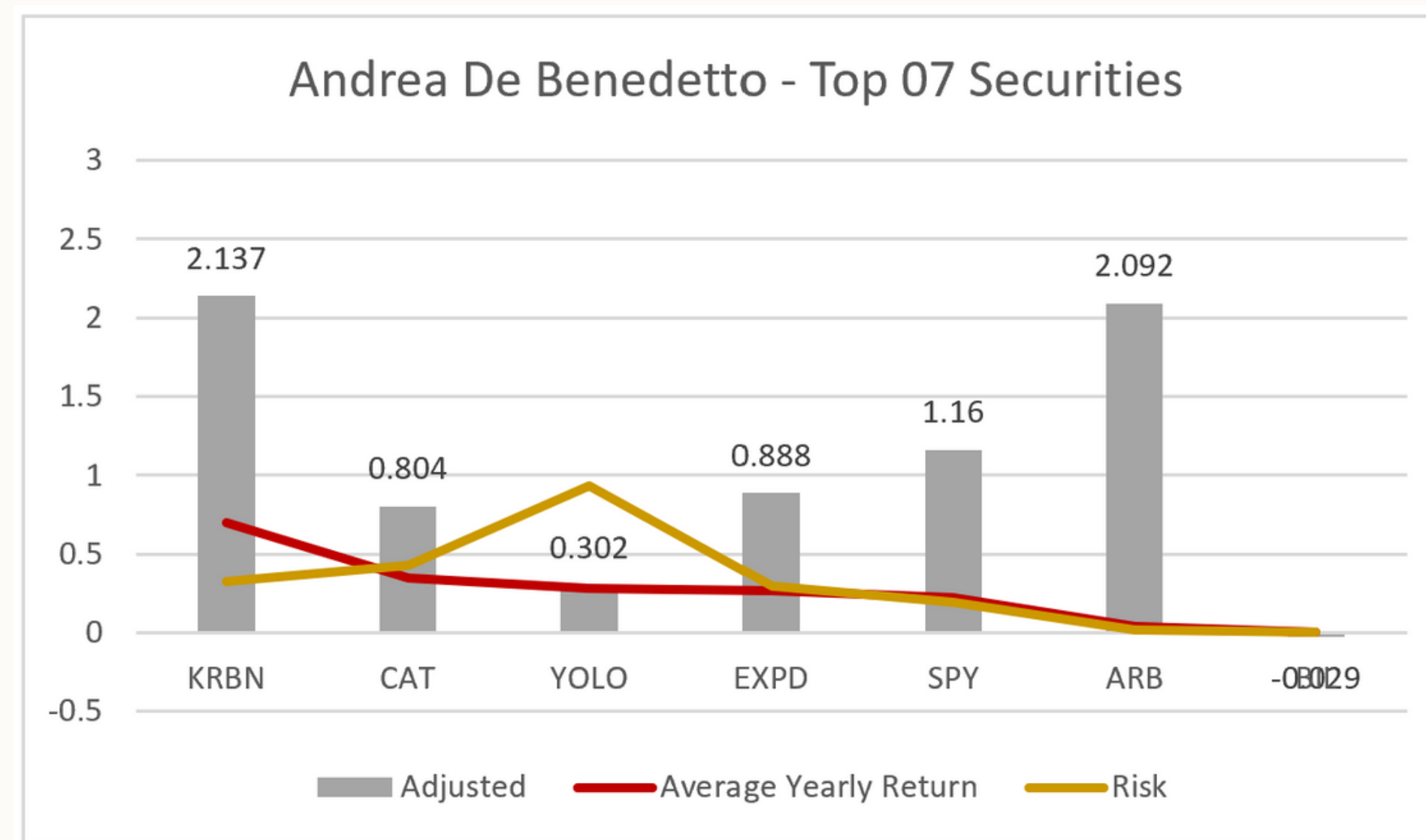
## INSIGHTS

Ticker (Replace to these)
VWO
SPY
SCHP
VTIP

Jessica Abou Khalil	12 M	18 M	24 M
Proposed Increment %	0.25	0.40	0.48
Current Return %	0.21	0.35	0.41
Increase	4.0%	5.7%	7.3%



# ANDREA DE BENEDETTO







# ANDREA DE BENEDETTO

Row Labels	Sum of adjusted_12	Sum of adjusted_18	Sum of adjusted_24
684	5.282	8.348	17.704
Andrea De Benedetto	5.282	8.348	17.704
ARB	2.092	2.83	8.25
KRBN	2.137	3.30	5.80
EXPD	0.888	1.38	2.59
CAT	0.804	1.45	2.42
SPY	1.16	1.60	2.28
BIL	-0.029	-0.11	0.21
YOLO	0.302	0.19	-0.29
BND	-0.554	-0.58	-1.06
SHY	-0.506	-0.64	-1.09
IEF	-1.012	-1.06	-1.40

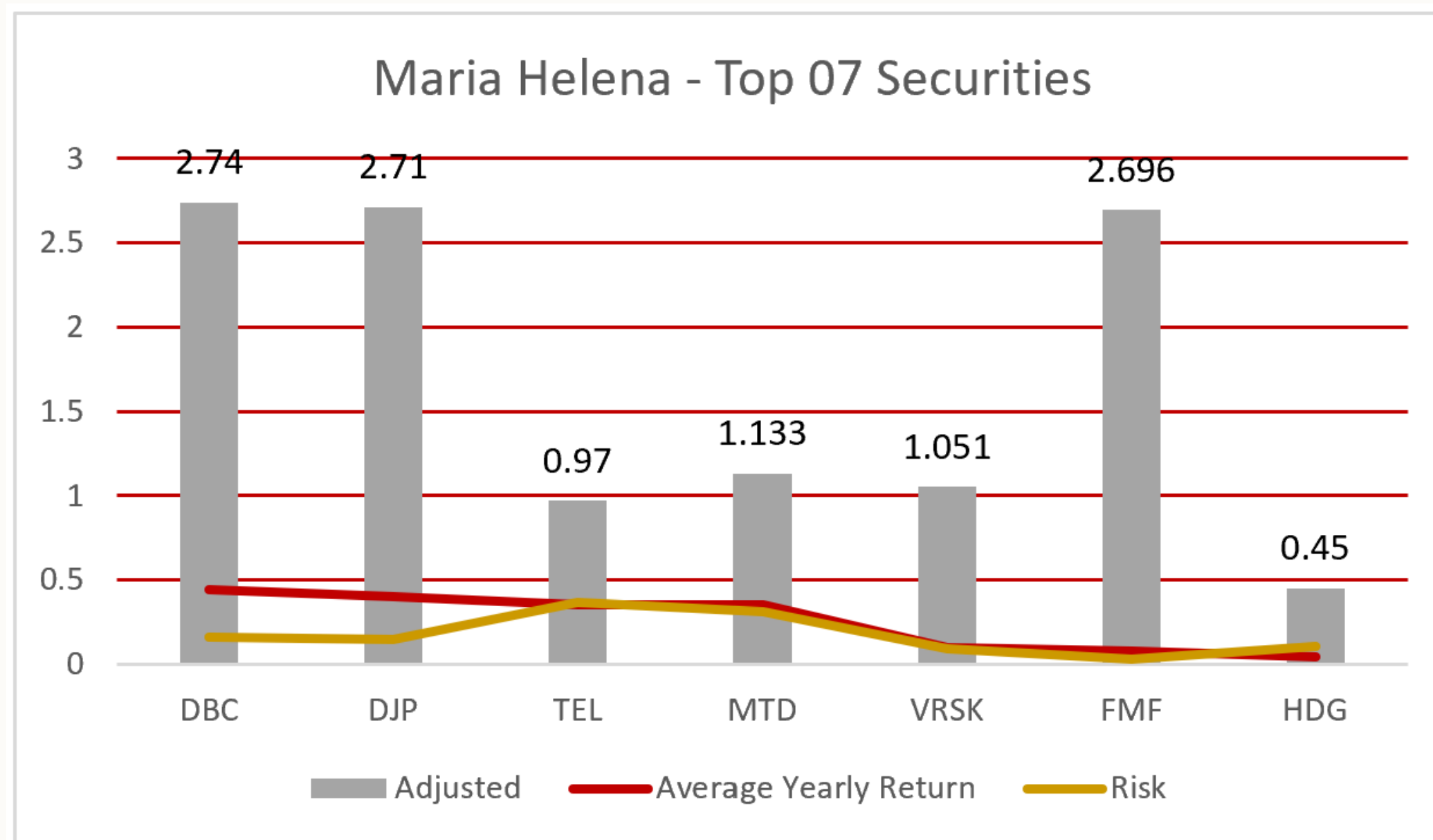
## INSIGHTS

Ticker (Replace to these)
VTIP
JPST
VWO
SCHP

	12 M	18 M	24 M
Proposed Increment %	0.21	0.32	0.42
Current Return %	0.18	0.27	0.34
Increase	3.0%	5.1%	7.3%



# MARIA D'OLIVIERA





# MARIA D'OLIVIERA

Row Labels	Sum of adjusted_12	Sum of adjusted_18	Sum of adjusted_24
539	-0.265	3.027	0.811
Maria Helena Nama D'Oliveira	-0.265	3.027	0.811
FMF	2.696	2.217	3.284
DBC	2.74	2.797	2.758
DJP	2.71	2.983	2.694
TEL	0.97	1.217	2.597
MTD	1.133	1.373	2.507
HDG	0.45	0.654	1.313
VRSK	1.051	0.816	1.06
AAAU	0.24	0.346	0.578
EOPS	-7.669	0	0
CTA	0	0	0
IGSB	-0.026	-0.017	-0.164
VGSH	-0.471	-0.594	-1.026
BND	-0.554	-0.581	-1.058
TLT	-1.129	-1.274	-1.47
KOLD	-2.406	-6.91	-12.262

## INSIGHTS

Ticker (Replace to these)
VTIP
JPST
VWO
SCHP

Maria Helena Nama D'Oliveira	12 M	18 M	24 M
539 Proposed Increment %	0.25	0.42	0.51
Current Return %	0.24	0.40	0.47
Increase	1.8%	2.8%	3.6%

# CONSIDERATIONS FOR CLIENT RECOMMENDATIONS

- MAINTAINED ASSET % DISTRIBUTION
- CHOSE HIGHER RISK ADJUSTED ROR  
TICKERS FOR BETTER ADJUSTED  
RETURN