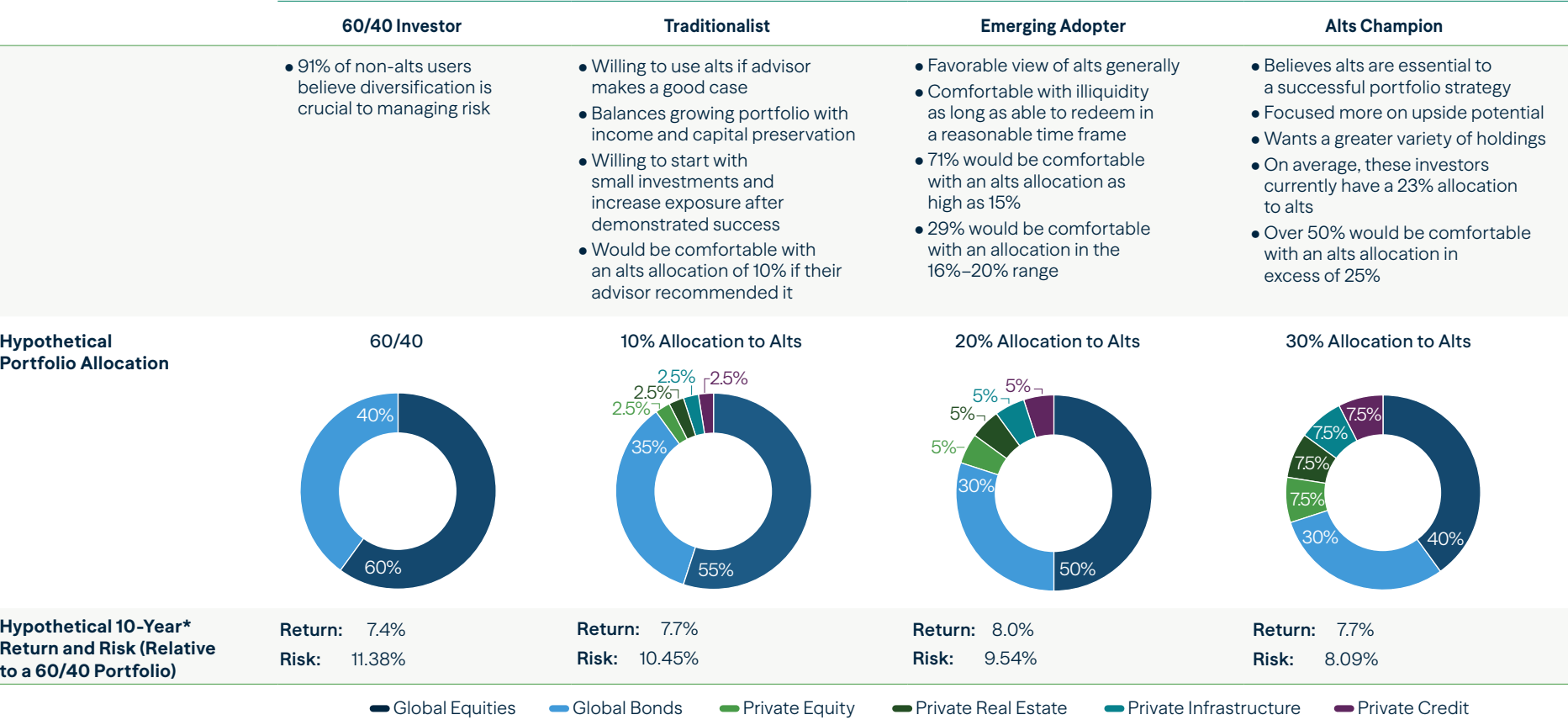


Diversifying With Alternatives

The Alts Institute's Alternative Investing Survey¹ uncovered three distinct high-net-worth investor profiles that provide valuable insight into each type's openness to alternative investments. Encouragingly, all three cohorts are receptive to exploring alternative opportunities with their advisors. In fact, 70% of non-alts users say they would begin investing in alts if advised to.

Below are hypothetical examples illustrating the potential benefits of adding a diversified blend of alternatives—equally allocated across infrastructure, private real estate, private credit and private equity—to traditional portfolios, tailored to each cohort's stated maximum allocation levels. Historically, a portfolio with alternatives exhibits improved return and lowered risk.



* 10-year annualized return and risk (measured by standard deviation, a measure of the amount of variation of the values of a variable about its mean). **Past performance is not indicative of future results.** Diversification does not guarantee a profit or protect against loss. For illustrative purposes only. This information does not represent the returns of a fund. An investor cannot invest in an index. Global Equities represented by the MSCI World Index, Global Bonds by the Bloomberg Global Aggregate Bond Index, Private Equity by the Preqin Private Equity Index, Private Real Estate by the Preqin Real Estate Index, Private Infrastructure by the Preqin Infrastructure Index and Private Credit by the Cliffwater Direct Lending Index. Please see disclosures for additional information. Source: Bloomberg, Cliffwater, MSCI, Preqin. As of June 30, 2025.

Endnote

1. Survey methodology: Brookfield commissioned CoreData Research to conduct separate online surveys between April and June 2024 of 300 financial professionals in the U.S. and Canada with an average practice AUM of US\$633 million, and 625 high-net-worth investors in the U.S., Canada, Hong Kong, Singapore and Taiwan with at least US\$2.5 million in household investable assets.

Brookfield Private Wealth LLC is registered as a broker-dealer with the U.S. Securities and Exchange Commission (SEC) and is a member of FINRA and the Securities Investor Protection Corporation (SIPC). Brookfield Private Wealth LLC is a wholly owned subsidiary of Brookfield.

The information contained herein is for educational and informational purposes only and is not intended as and may not be relied on in any manner as legal, tax or investment advice, as a recommendation, or as an offer to sell or a solicitation of an offer to buy any securities offered by Brookfield Corporation and its affiliates (together, “Brookfield”). Brookfield may not have verified (and disclaims any obligation to verify) the accuracy or completeness of any information included herein, including information that has been provided by third parties, and you cannot rely on Brookfield as having verified any of the information. Any outlooks or forecasts presented herein are as of the date appearing in this material only and are also subject to change without notice. **Past performance is not indicative of future performance, and the value of investments and the income derived from those investments can fluctuate.**

Index provider disclaimer

The quoted indexes within this publication are unmanaged and cannot be purchased directly by investors. Index performance is shown for illustrative purposes only and does not predict or depict the performance of any investment. There may be material factors relevant to any such comparison, such as differences in volatility or regulatory and legal restrictions between the indexes shown and any investment in a Brookfield strategy, composite or fund. Brookfield obtained all index data from third-party index sponsors and believes the data to be accurate; however, Brookfield makes no representation regarding its accuracy. Indexes are unmanaged and cannot be purchased directly by investors.

Brookfield does not own or participate in the construction or day-to-day management of the indexes referenced in this document. The index information provided is for your information only and does not imply or predict that a Brookfield product will achieve similar results. This information is subject to change without notice. The indexes referenced in this document do not reflect any fees, expenses, sales charges or taxes. It is not possible to invest directly in an index. The index sponsors permit use of their indexes and related data on an as is” basis, make no warranties regarding same, do not guarantee the suitability, quality, accuracy, timeliness and/or completeness of their index or any data included, related or derived from it, and assume no liability in connection with the use of the foregoing. The index sponsors have no liability for any direct, indirect, special, incidental, punitive, consequential or other damages (including loss of profits). The index sponsors do not sponsor, endorse or recommend Brookfield or any of its products or services. Unless otherwise noted, all indexes are total-return indexes.

Diversifying with Alternatives

Index definitions

The Bloomberg Global Aggregate Index is a market-capitalization-weighted index comprising globally traded investment-grade bonds. The index includes government securities, mortgage-backed securities, asset-backed securities and corporate securities to simulate the universe of bonds in the market. The maturities of the bonds in the index are more than one year.

The Cliffwater Direct Lending Index measures the unlevered, gross-of-fees performance of U.S. middle market corporate loans, as represented by the asset-weighted performance of the underlying assets of business development companies (BDCs), including both exchange-traded and unlisted BDCs, subject to certain eligibility requirements.

The MSCI World Index is a free-float-adjusted market-capitalization-weighted index that is designed to measure the equity market performance of developed markets.

The Preqin Private Equity Index captures in an index the return earned by investors on average in their private equity portfolios, based on the actual amount of money invested in private capital partnerships. Historical data points are not recalculated as time passes, except for the latest two quarters available, which are preliminary. The preliminary quarters are finalized at a three-quarter lag coinciding with the full constituency for the as-at date being met. The universe of funds for each quarterly point in the index may change over time depending on data availability.

The Preqin Infrastructure Index captures the average returns earned by investors in their infrastructure portfolios, based on the actual amount of money invested. Historical data points are not recalculated as time passes, except for the latest two quarters available, which are preliminary. The preliminary quarters are finalized at a three-quarter lag coinciding with the full constituency for the as-at date being met. The universe of funds for each quarterly point in the index may change over time depending on data availability.

The Preqin Private Real Estate Index captures in an index the return earned by investors on average in their private real estate portfolios, based on the actual amount of money invested in private capital partnerships. Historical data points are not recalculated as time passes, except for the latest two quarters available, which are preliminary. The preliminary quarters are finalized at a three-quarter lag coinciding with the full constituency for the as-at date being met. The universe of funds for each quarterly point in the index may change over time depending on data availability.

The S&P 500 Index is an equity index of 500 widely held, large-capitalization U.S. companies.

© 2026 Brookfield

Contact Us

privatewealth.brookfield.com



privatewealth@brookfield.com



Follow us on LinkedIn