

Introducing the Alts Allocator

The Alts Allocator, powered by iCapital Architect, makes it easy to model, build and compare portfolios that showcase how alternative investments can strengthen long-term outcomes. Users can explore portfolios aligned with three distinct investor personas—each shaped by insights from the Alts Institute Alternative Investing Survey. You can also customize your own portfolio to reflect specific goals and preferences.

TRY THE ALTS
ALLOCATOR



Start Using the Alts Allocator in Three Steps

The Alts Allocator offers a seamless, interactive experience through model portfolios or a custom portfolio constructed from a menu of indexes.

Our **Core Four Mix** is the most straightforward and quickest way to get started. In just three steps, compare a traditional 60/40 portfolio to a portfolio that includes an equal allocation of private credit, private equity, private infrastructure, and private real estate.

- 1 From the **Portfolio Analysis** tab, choose the investor profile that matches your target allocation to alternatives in your total portfolio.
- 2 Choose **Core Four Mix** from the drop-down menu.

Investor Profile

Select an investor profile.

Emerging Adopter

Traditionalist
(Dabbling at 10%)

Emerging Adopter
(Increasing to 20%)

Alts Champion
(Maximizing to 30%)

Choose your alternative investment.

Private Credit

Core Four Mix

Private Credit

Private Equity

Private Infrastructure

Private Real Estate

To explore models beyond the Core Four Mix, select an individual alts category from the list.


- 3 Click **Get Analysis Report** to download or share your model comparison.

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Customize Your Analysis

- 1 Toggle to the **Custom Analysis** tab and click on **Create Custom Portfolio**.
- 2 Select asset classes to add to the portfolio from the list of **indexes**.
- 3 Edit the dollar amount and select the check mark, or hit return on your keyboard, to save the desired allocation. When finished adding allocations, click on **Conclude and Analyze**.
- 4 Under **Analysis**, select **Allocations**, **Hypothetical Performance** and **Scenarios** to compare the results to predefined portfolios.
- 5 Click on **Get Analysis Report** to download or share your model comparison.

Create custom portfolio


Custom portfolio 

Portfolio value \$83,000

4 HOLDINGS

Private Credit

- Private Credit



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Private Real Estate

- Private Real Estate

\$4,000

4.82%






Public Equities

- US Large Cap Equity

\$45,000

54.22%






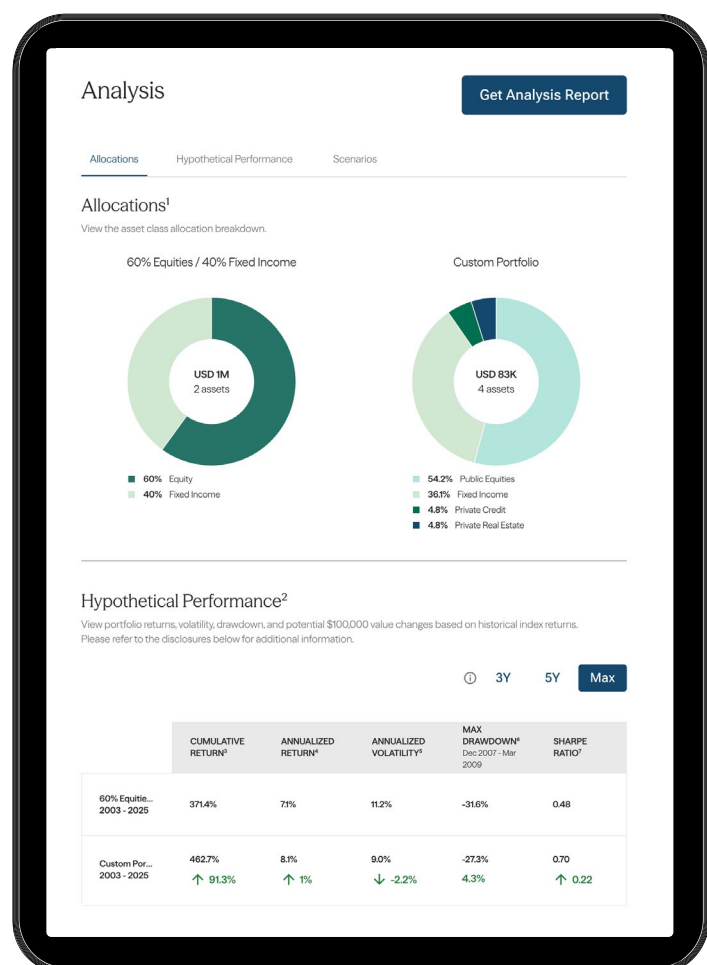
Fixed Income

- Core Fixed Income

\$30,000

36.14%



Contact us at 1.855.777.8001 to schedule an Alts Allocator walk-through with one of our specialists.

Disclosure

Any analysis or information presented is intended for illustrative purposes only and should not be relied upon as a forecast, prediction, projection, guarantee, research, recommendation or advice of any kind, including investment, tax, accounting or legal advice. Nothing herein is intended to be a recommendation of any specific security or investment strategy or to meet the investment objectives or needs of any specific investor. Any decision based upon the output and information contained on the Alts Allocator are the sole responsibility of the user.

Sample portfolios are for illustrative purposes only, and they do not represent all possible investment objectives.

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

Important Information

Alternative investments are complex, speculative investment vehicles and are not suitable for all investors. An investment in an alternative investment entails a high degree of risk, and no assurance can be given that any alternative investment fund's investment objectives will be achieved or that investors will receive a return of their capital.

As an asset class, private credit encompasses a large variety of different debt instruments. While each has its own risk and return profile, private credit assets generally have increased risk of default, due to their typical opportunistic focus on companies with limited funding options, in comparison with their public equivalents.

Because private credit usually involves lending to below-investment-grade or non-rated issuers, yield on private credit assets is increased in return for taking on increased risk.

Investments in real estate-related instruments may be affected by economic, legal or environmental factors that affect property values, rents or occupancies of real estate.

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