

**PORTFOLIO DESCRIPTION**

The NewSquare MACRO Series is a suite of actively managed portfolios for investors who want to combine long-term growth with an innovative risk management strategy guided by macroeconomic analysis. Investing in exchange-traded funds, or ETFs, which offer cost effectiveness and tax efficiency, the portfolios can pivot across geographic regions, asset classes and sectors. A seasoned investment team conducts a wide-ranging analysis of fundamental macroeconomic conditions and attempts to position the portfolios—whether Aggressive, Moderate or Conservative—to produce attractive risk/returns over the long term.

**INVESTMENT OBJECTIVE**

- Wealth preservation in high risk market environments through overweighting of defensive asset classes.
- Wealth accumulation during positive performance trends for an asset class, overweighting offensive options.
- Designed to be offensive and defensive in order to produce attractive risk/returns over a long-term.

**ASSET ALLOCATION RANGES**

Asset class weightings are applied through fundamental research for each investment category, resulting in portfolios of approx. 10-20 ETFs. The investment range for each strategy is shown below.

	US Equity		Int'l Equity		Fixed Income		Alternatives		Cash	
	Min (%)	Max (%)	Min (%)	Max (%)	Min (%)	Max (%)	Min (%)	Max (%)	Min (%)	Max (%)
<b>Conservative</b>	2.5	50	0	15	20	85	0	20	0	35
<b>Moderate</b>	5	70	0	20	15	80	0	25	0	35
<b>Growth</b>	15	85	0	25	15	65	0	10	0	35
<b>Aggressive</b>	20	85	0	30	10	70	0	35	0	35

**ABOUT NEWSQUARE CAPITAL, LLC**

NewSquare Capital, LLC (“NewSquare”), an independent registered investment advisor and portfolio management firm, provides simple, efficient, and innovative solutions to help clients achieve their lifetime investment goals. NewSquare offers a sophisticated suite of investment strategies that use Exchange Traded Funds (“ETFs”) as the primary vehicle to invest in multiple asset classes globally. NewSquare’s diversified family of portfolio solutions is comprised of three distinct, yet complementary, strategies – STRATEGIC, MACRO, and RELATIVE STRENGTH.

For the MACRO portfolio series, NewSquare considers economic trends such as growth, the inflationary environment, the level and direction of interest rates, labor markets, and consumer behavior in making investment decisions across asset classes globally.

**ALLOCATION TILTS**  
SAMPLE: GROWTH PORTFOLIO
