



# Portfolio Risk

Does an investor's risk tolerance align with how they're invested? A portfolio-wide Risk Number® and 95% Historical Range™ enable you to make investment decisions and demonstrate alignment to your prospects and clients.

- ✓ Select
- ✓ Elite
- ✓ Ignite
- ✓ Ultimate

## Illustrate normal portfolio behavior.

The 95% Historical Range illustrates the risk in your client's portfolio, representing the potential gains or losses it may experience over a six-month period.

Although there's 5% we can never quantify, investors make better decisions when they understand what is "normal" for their portfolio. Great advisors use Nitrogen to set expectations and illustrate the relationship between risk and return.

When clients understand their 95% Historical Range, it gives them permission to 'hang in there,' even when markets are volatile.



95% Historical Range (Six Months)



VTSMX · Vanguard Total Stock Market

RISK NEXT 6 MONTHS

IWM · iShares Russell 2000

RISK NEXT 6 MONTHS

SPY · SPDR® S&P 500 ETF

RISK 76 NEXT 6 MONTHS

Risk / Return Scenario

WORST CASE	BEST CASE	=	RETURN	VOLATILITY
-16.84%	26.52%		-16.84%	26.52%

ANNUAL DIVIDEND: 1.41%    EXPENSE RATIO: 0.09%

## Understand the risk of each holding.

Analyze the risk of over a quarter-million securities, products, and strategies to see how accounts roll up into a portfolio-wide Risk Number.

Nitrogen runs daily analysis at the individual security level, meaning we don't lump funds or stocks into asset classes and make broad assumptions. Whether you use stocks, ETFs, mutual funds, bonds, REITs, or annuities, every security has an individual Risk Number.

Whether you're optimizing a client's current portfolio, proposing a brand new one, or comparing portfolios side-by-side, Nitrogen's analytics have you covered.

LEARN MORE AT NITROGENWEALTH.COM



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