

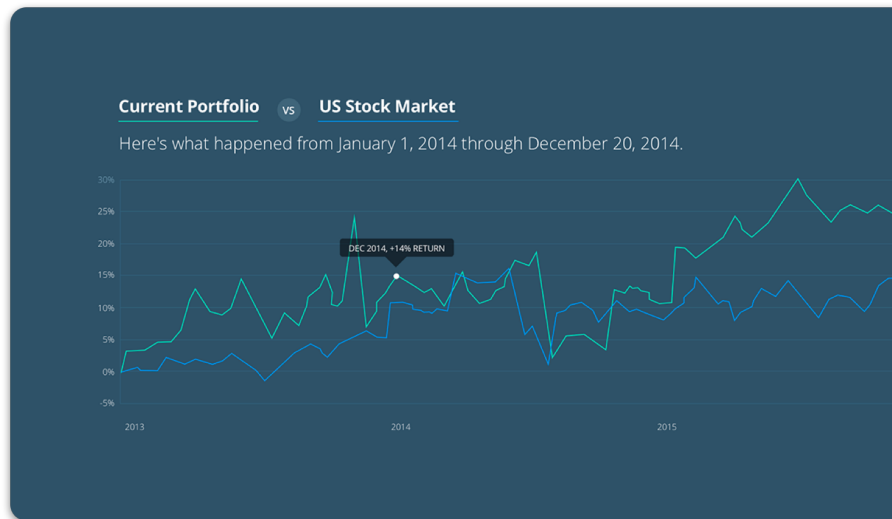


Scenarios

Run a portfolio through a market timeline and compare it to just the right benchmark to make your point.

Next-level stress testing.

You've always been able to see how a client's portfolio would have performed during specific market events, but now you can string these events together to create a portfolio narrative that settles the question once and for all... "Why is the market beating my portfolio?"



Custom Scenario 3

JAN 2013 JAN 2015

50.1% MARKET RETURN

41bps INTEREST RATE CHANGE

Prove your fiduciary care with custom scenarios.

Want to show off the historical dynamics of 2020 volatility or the dot com bubble with your clients' current portfolios? Now you can illustrate your point by visualizing custom scenarios.

With up to five comparisons — using proposals, indexes, blended benchmarks, or individual stocks or funds — you can illustrate the relationship between risk and reward in a historical context to help them make the right decisions.

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Nitrogen
470 Nevada Street
Auburn, CA 95603



844-4-NITROGEN
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