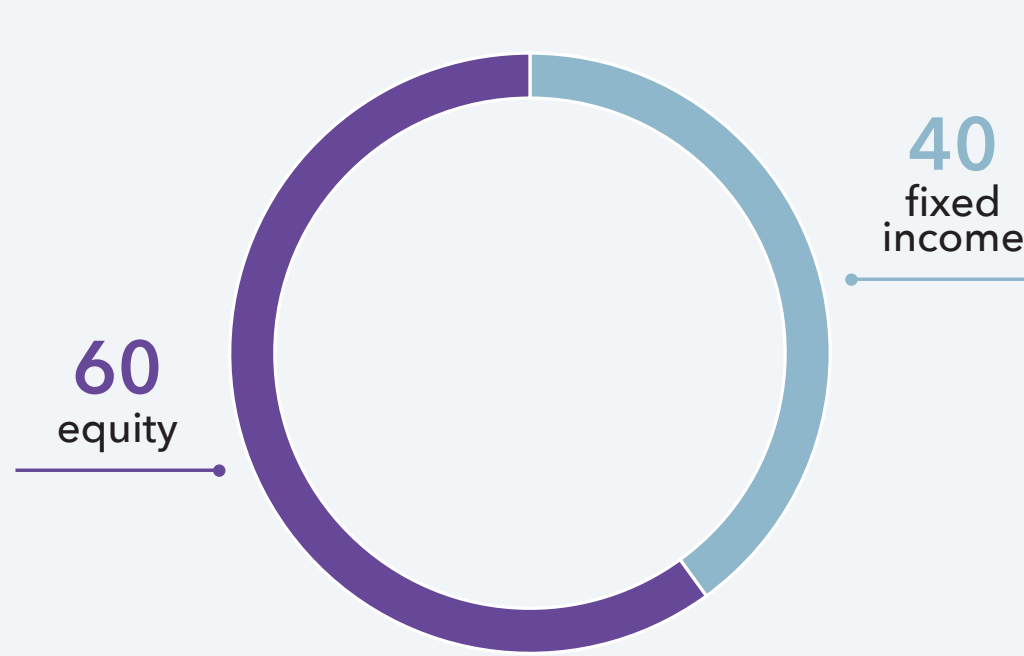


TIME TO RETHINK THE 60/40 ALLOCATION STRATEGY

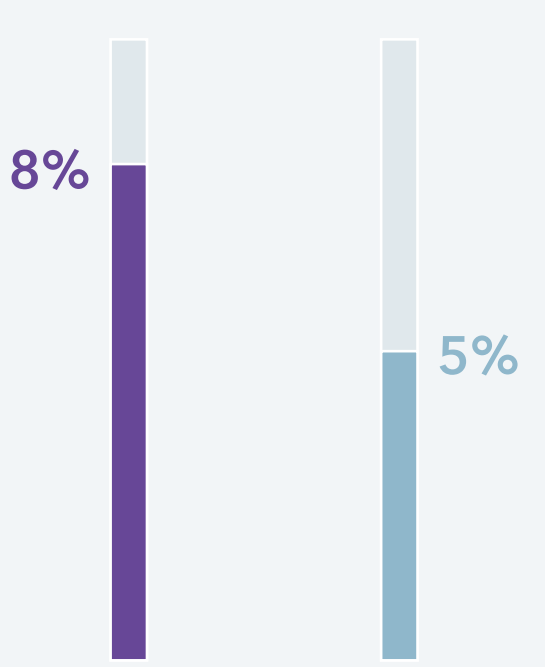
LONG-TERM EXPECTATIONS FOR EQUITIES AND FIXED INCOME ARE HITTING A HISTORIC LOW



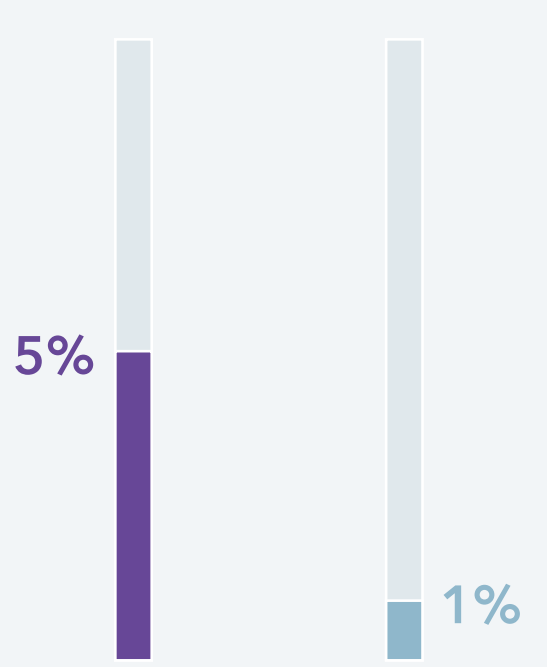
For decades, the **60/40 portfolio** has been a rule of thumb for asset allocation.

Historically it has served investors well, but the long-term outlook for equities and fixed income is challenging.

Last 30 years have been strong...



...but the next 15 years will be difficult



Last 30 years

Next 15 years

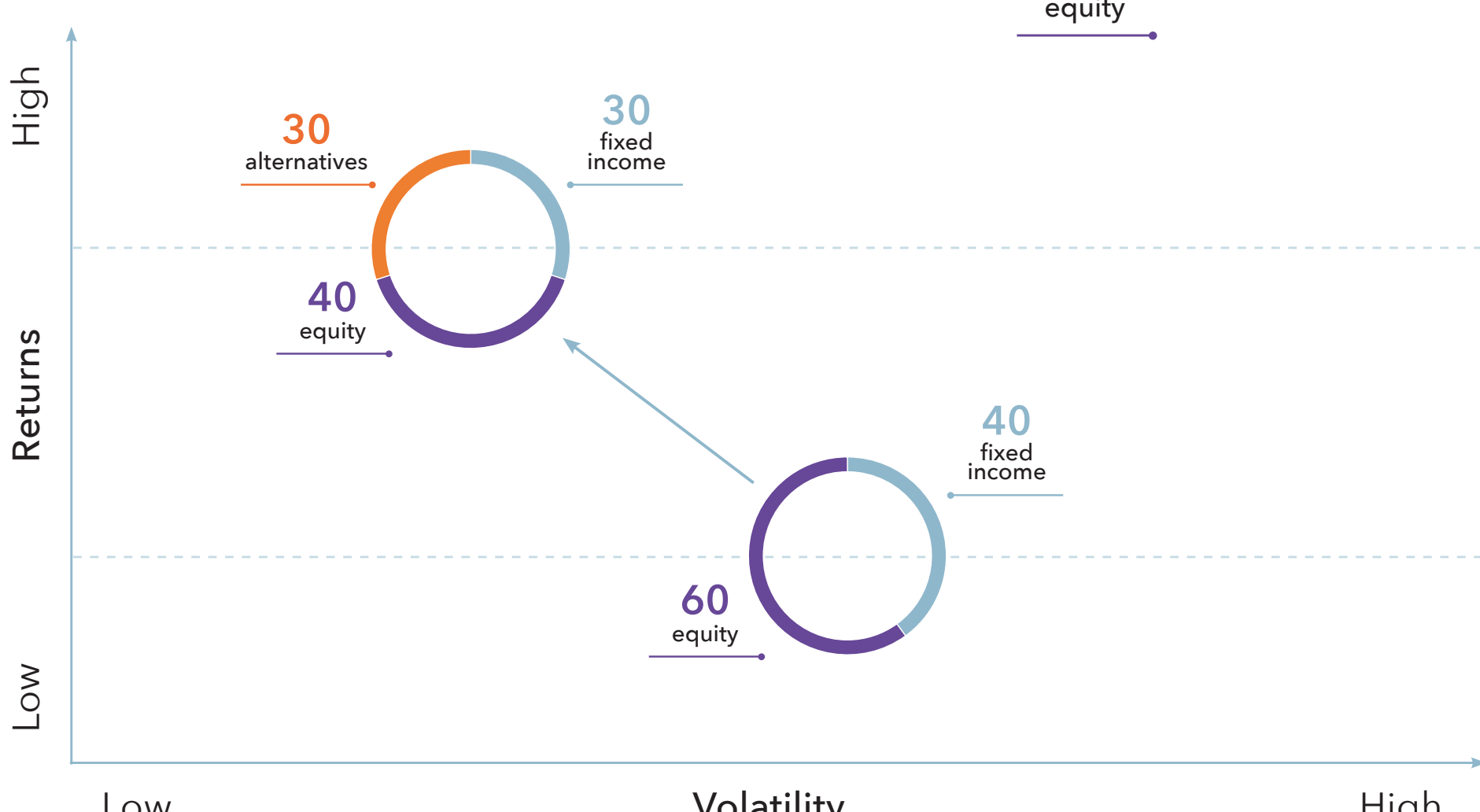
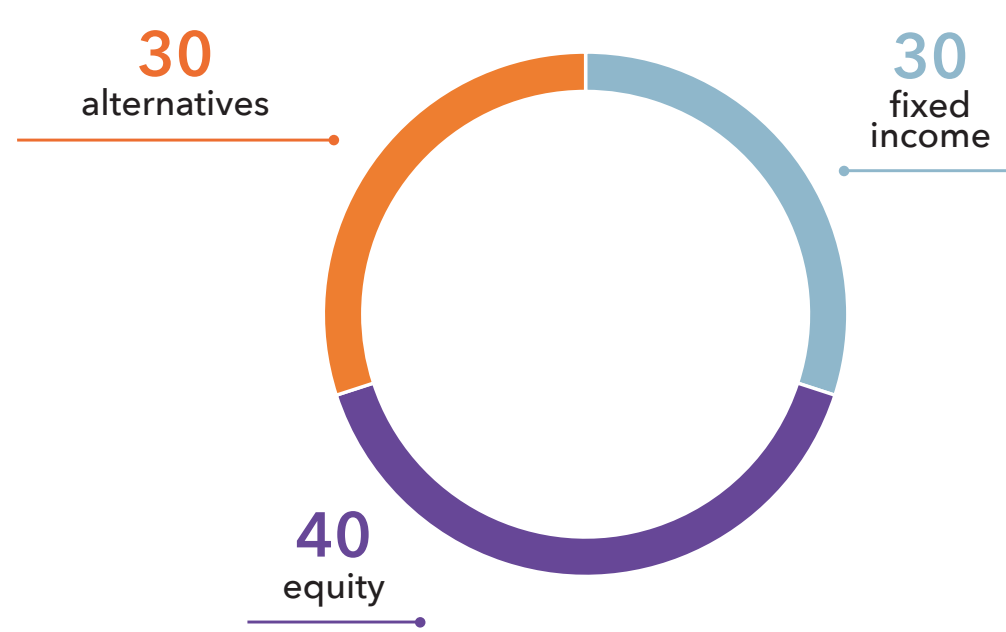
According to JP Morgan LTCM 2022

ADD ALTERNATIVES TO THE MIX!

Adding alternatives to the traditional 60/40 portfolio offers **higher returns and less volatility**. Alternatives also complement the traditional portfolio by **being less sensitive to market movements**.

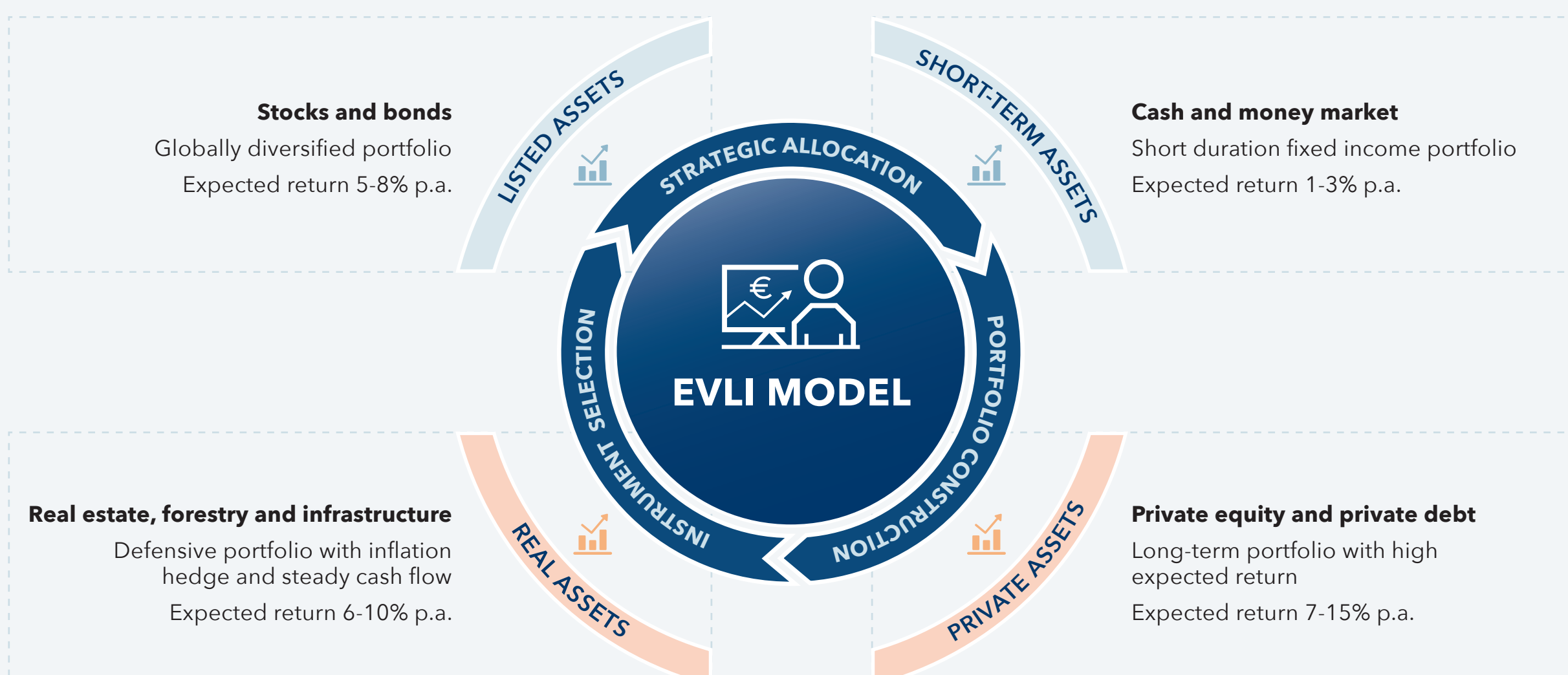
ALTERNATIVE INVESTMENTS

Alternatives, such as private equity, infrastructure and real estate offer **higher long-term expected returns, diversification, inflation protection and steady cash flow**.



THE BUILDING BLOCKS FOR AN OPTIMAL STRATEGIC ALLOCATION

In the **Evli model** alternative asset classes are incorporated in the investment portfolio to that **maximizes the long-term risk/return ratio**.



EVLI ALTERNATIVES IN A NUTSHELL

Evli offers access to the best alternative funds globally and a long experience in alternative asset management.

2002
first fund

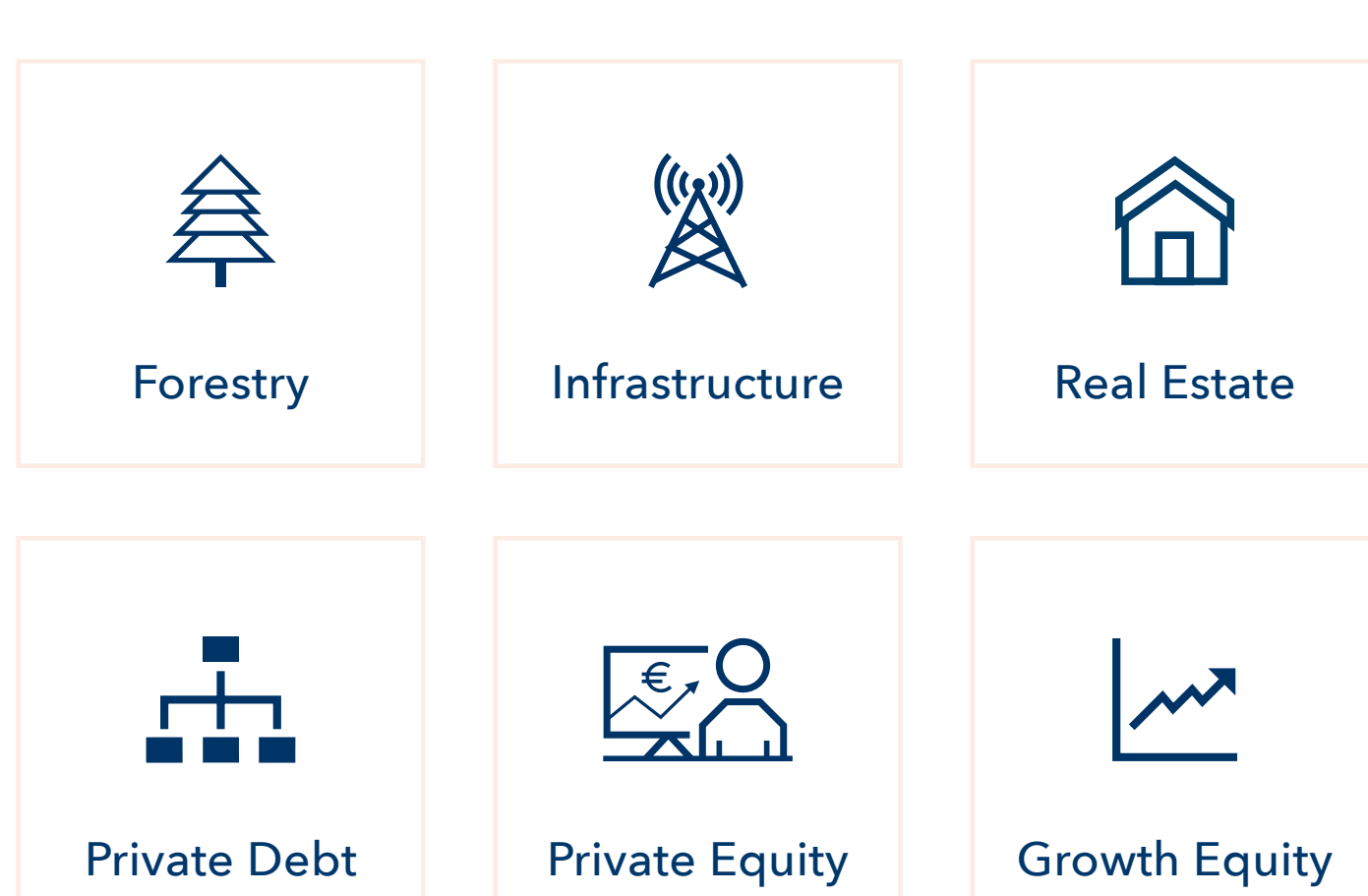
23
person team

12
private asset funds

EUR 1.8 bn
assets under management

Figures as at June 30, 2022

EVLI ALTERNATIVE OFFERING



WHAT DOES YOUR ALLOCATION LOOK LIKE?

EVLI

Want to know more?
Visit evli.com/privateassets

Sources: Bloomberg Ltd, MSCI Ltd, JP Morgan Long-term Capital Market Assumptions 2022, Evli Oyj
Read more: evli.com/disclaimer