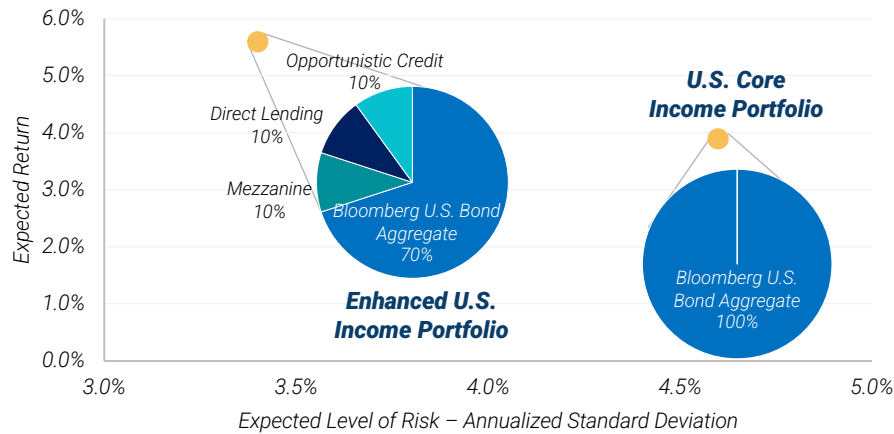


Historically, adding private investments has shown the potential to improve returns while reducing risk.

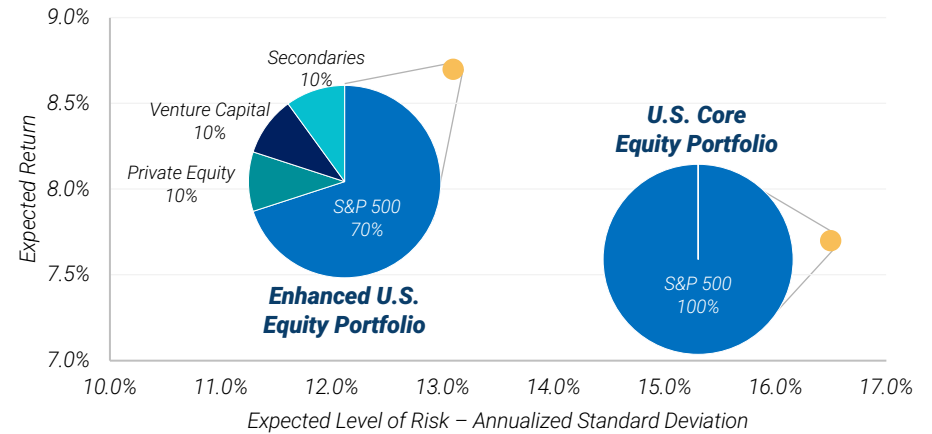
Historically, portfolios that have included allocations to private investments, such as private debt and private equity, have displayed the ability to deliver higher returns with lower volatility and greater diversification relative to traditional portfolios focused only on public equity and public debt. While public markets remain an important focus for many investment strategies, the addition of select private market exposures may help smooth returns, enhance diversification, and strengthen long-term performance across market cycles.

Income Focused Portfolio Enhancing Return per unit of Risk (2000-2024)



Incorporating a blend of private debt strategies such as direct lending, opportunistic credit, and mezzanine debt may provide client accounts with increased potential returns and better risk-adjusted returns.¹

Equity Focused Portfolio Return / Risk Trade-off (2000-2024)



Similarly, allocating a portion of a traditional portfolio to a core strategy of private equity, along with satellite strategies such as private equity secondaries and venture capital may enhance return potential and reduce correlation across market cycles.¹

LEARN MORE

An allocation to private markets may increase returns, lower risk, and strengthen diversification. To explore which strategies might be right for your clients' goals, contact us at 800.684.1006 or info@axxescapital.com.

1. Illustrative purposes only. Pitchbook for private market returns; Factset for Bloomberg U.S. Bond Aggregate; Axxes Capital for illustrative hypothetical returns.

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