

Vanguard Portfolio Solutions

Helping clients achieve their desired investment outcomes.

Draw on Vanguard's expertise to enhance and build diversified, low-cost portfolios.

Achieving intended outcomes with strong risk management principles is what investing is all about. Vanguard's Portfolio Consulting team offer a range of services providing insights, analysis and solutions to help you better understand, examine and improve upon your model portfolios.



Self-service



Portfolio Analytics



Forward-looking Analysis



Portfolio Construction

Self-service

- Generate fund and portfolio comparisons that distill portfolio returns and basic risk metrics using Vanguard's web-based portfolio analytics tool.¹

Investment growth

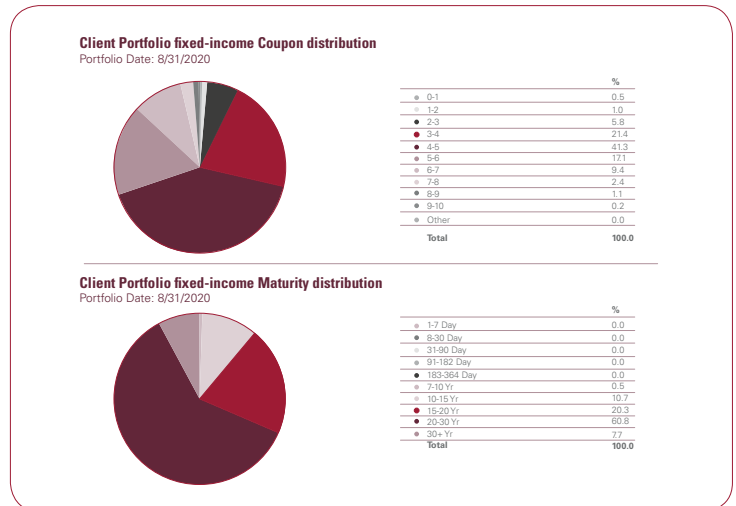
Vanguard Total Stock Market ETF (USD, VTI)



¹Available for US-domiciled ETFs only

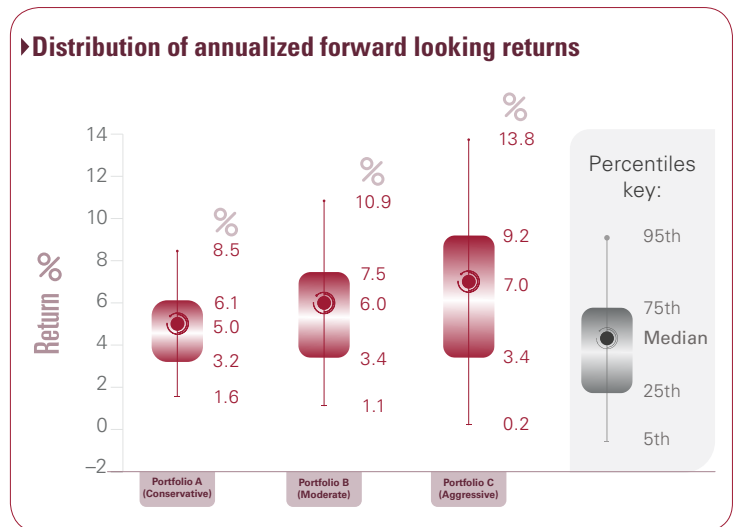
Portfolio Analytics

- Produce detailed comparison reports for fixed income and equity funds/ETFs.
- Conduct a comprehensive holdings-based analysis, across both equity and fixed income portfolios.
- Explore portfolio-level style drift and tilts.
- Assess detailed historical risk/return metrics, including portfolio-level attribution analysis.
- Get granular fixed income analysis such as credit quality, interest rate sensitivity and geographic exposure.
- Gauge how your portfolio would have performed during past events such as the 2020 Covid-19 health crisis or the 2007-2008 global financial crisis.



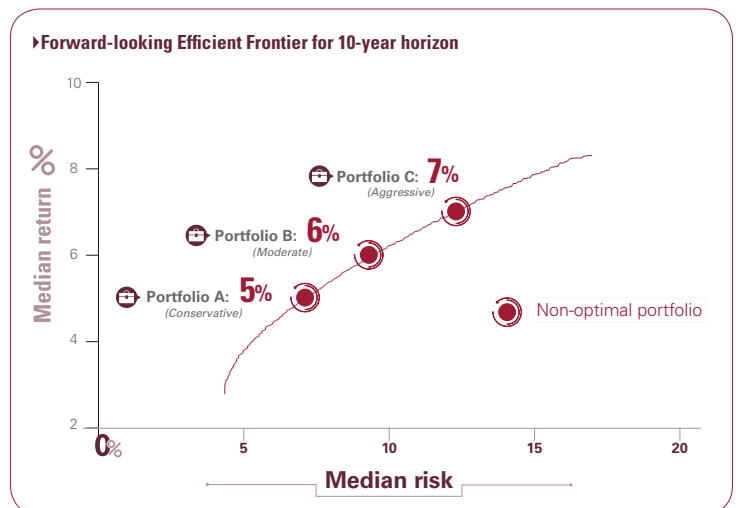
Forward-looking Analysis

- Limitations of relying only on historical analysis is that it may only be applicable to a normalized environment and thus does not account for fat tailed risk.
- Overcome these and other limitations by accessing our proprietary Vanguard Capital Markets Model (VCMM) to evaluate the likelihood of achieving various investment outcomes.
- Set future risk and return expectations for actual client portfolios, gain deeper insights on potential sources of risk and understand the drivers of return.



Portfolio Construction

- Vanguard is one of the world's largest multi-asset manager, with proven expertise managing long-term client portfolios.
- Vanguard can provide access to our strategic model UCITS ETF portfolios, a simple yet scalable solution to help advisors deliver strong long-term investment outcomes for their clients.
- Alternatively, choose to partner with Vanguard to develop customized model portfolios which leverages our forward-looking VCMM and incorporates your unique needs to develop an optimized investment solution.
- Collaborate with Vanguard to leverage our brand, distribution and corporate support to help grow your client assets and business.



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