

# Stress test your portfolio

## Risk Analysis & Portfolio Testing Review (RAPTR)



### Do you worry how market events may impact your financial goals?

The RAPTR report may help gauge the impact market events may have on your portfolio to identify what is creating the greatest risk.

### Get started today by contacting your financial advisor

### The benefits

- Detailed risk analysis and stress testing of portfolios
- Illustrates risks at the security, asset class, and portfolio levels
- Generates an in-depth review of the portfolio's risk levels
- Can lead to conversation and action to help stay on track toward goals

### Stress tests

RAPTR can illustrate the hypothetical impact of certain scenarios to review your level of comfort with potential economic and market events such as: U.S. Recession, U.S. Economic Recovery, or a Financial Crisis. The tool features 14 different scenarios to choose from.

### Quantified risks

Unlike other tools that work at the asset class level, RAPTR provides a detailed, security-level risk analysis aggregated to the asset class and portfolio levels. RAPTR provides detailed risk analysis by looking at the holdings in the portfolio rather than a generic asset class. This deep analysis helps identify riskier holdings in the portfolio and spotlight potential hidden risks.

### Deep analysis

To assist with conversations around the value of diversification, the output report contains additional metrics which include:

- Risk factor decomposition
- 1 month, 95% value at risk
- Expected shortfall
- Top 5 security volatility contributors

### The service and solution

We have a team of experienced financial professionals to provide guidance on your portfolio with recommendations to help meet goals.

**Important:** The projections or other information generated by Risk Analysis & Portfolio Testing Review regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Results may vary with each use and over time.

*All investing involves risk, including the loss of principal. Diversification does not guarantee profit or protect against loss in declining markets.*

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