

MULTI-MANAGER PORTFOLIO SOLUTIONS

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Prima Capital combines its professional research and due diligence capabilities with its multi-step evaluation processes in the construction of multi-manager portfolios and asset allocation models. These broadly diversified products seek to maximize global investment opportunities in a controlled portfolio risk framework.

Based on well-defined manager selection and asset allocation principles, Prima Capital's portfolio construction technique utilizes:

- A core-satellite approach that combines passive and active strategies to balance alpha-seeking activities and the need for low-cost market exposure
- Broadly diversified and lower correlated asset classes to minimize volatility
- Opportunistic investment managers to increase alpha generation potential

Prima Capital believes these techniques, typically found only in institutional investment offerings, can benefit any investor. And Prima Capital's thoughtful capital market assumptions and asset allocation models address the needs of both taxable and tax-exempt investors. The resulting solutions enhance any investment program and extend a wealth manager's reach and share of target markets.

PRIMA CAPITAL TARGET RISK PORTFOLIOS

Prima Capital Target Risk Portfolios provide a comprehensive, professionally managed investment program for a broad range of investors. A series of six portfolios offered across the investment risk spectrum, ranging from Conservative Income to the more aggressive Concentrated Growth, the Portfolios' design includes:

- *Open Architecture Platform*

Prima Capital considers the entire universe of available funds, not just a select number of fund families.

- *Broad Asset Class Representation*

Asset class inclusion extends beyond the basic retail mix of domestic, fixed income, and international securities. Prima considers non-traditional and lower correlation asset classes including commodities, emerging markets, and international fixed-income investments.

- *Strategic Asset Allocation*

Asset allocation decisions are based on a set of five-year estimates that are re-evaluated every year.

- *Core and Satellite Portfolio Construction*

A portion of the portfolio is devoted to passive funds to gain low-cost exposure to the broad market, while "active" investment managers with expertise in a market segment are used to pursue tactical opportunities.