

# Market Tipping Point

## Navigating Volatility

Eugene Country Club

June 4, 2025



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# Founding Managing Member

RiskBridge's founder, Bill Kennedy, has 30+ years of experience investing in global capital markets, asset allocation, & portfolio management



**William Kennedy, CFA**

Founder, Chief Executive Officer & Chief Investment Officer

- Chief Investment Officer and Board Director for Fieldpoint Private
- Global Director of Research for Citigroup Global Markets serving Citi's investment banking, private bank, and Smith Barney divisions
- Appointed to Citigroup Management Committee in 2004
- Director of Research for Nikko|Citigroup in Tokyo, Japan
- Asset Allocation Analyst for the DuPont Pension Fund

# Firm Overview

2020

Year Founded

\$834M

Assets Under Management

\$137B

Assets Under Advisement

15

Employees

100+

Investment Professionals'  
Years of Combined Industry  
Experience in

One

Investment Philosophy

Source: RiskBridge Advisors, LLC. Assets under advisement (AUA) and assets under management (AUM) as of March 7, 2025. See disclosures at the back.

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1.

## Policy Uncertainty



**For illustration purposes only.**



High policy uncertainty affects business investment, hiring, consumer spending, and volatility



**Past performance is no guarantee of future results.** For illustration purposes only. Source: FRB St. Louis, Economic Policy Uncertainty Index <https://www.policyuncertainty.com/methodology.html>  
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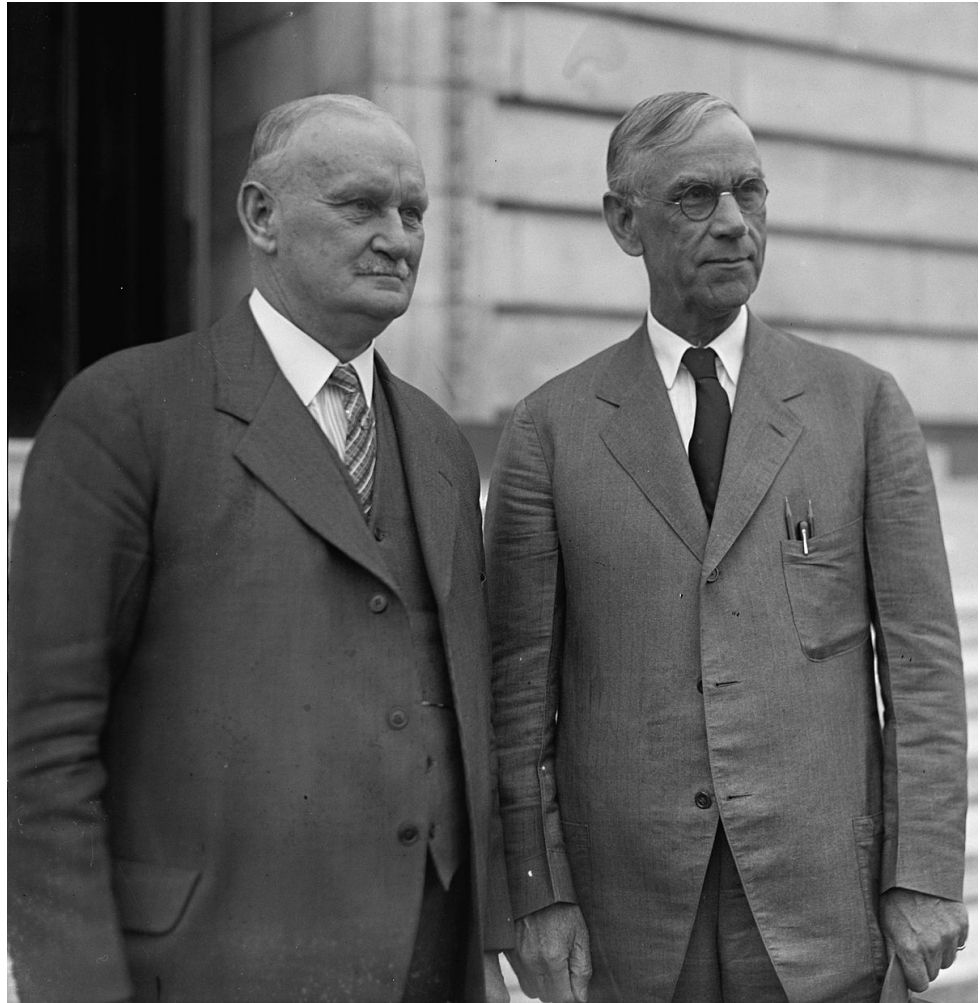


FIRST, THE  
"SPINACH"...

# Current policy settings are an economic headwind and inflationary

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Tariffs, D.O.G.E, and  
Immigration policies are  
economic headwinds



...THEN THE  
"CANDY"

**Proposed  
policy  
settings, if  
enacted, are  
an economic  
tailwind and  
inflationary**



# SORTING THROUGH THE POLICY NOISE

**Nominal  
GDP growth  
average of  
5.2%**

## GROWTH

Year	Baseline Real GDP Growth	Contractionary Policies ("Spinach")	Expansionary Policies ("Candy")	Net Combined Impact	Change from Baseline
2025	2.4%	-0.8%	0.3%	1.9%	-0.5%
2026	2.1%	-0.5%	0.6%	2.2%	0.1%
2027	2.0%	-0.2%	0.7%	2.5%	0.5%
2028	2.0%	-0.1%	0.8%	2.7%	0.7%
2029	2.0%	0.0%	0.8%	2.8%	0.8%

## INFLATION

Year	Baseline Inflation (PCE)	Contractionary Policies ("Spinach")	Expansionary Policies ("Candy")	Net Combined Impact (PCE)	Change from Baseline
2025	2.5%	0.8%	0.2%	3.5%	1.0%
2026	2.2%	0.5%	0.3%	3.0%	0.8%
2027	2.0%	0.3%	0.2%	2.5%	0.5%
2028	2.0%	0.1%	0.1%	2.2%	0.2%
2029	2.0%	0.0%	0.0%	2.0%	0.0%

Source: RiskBridge, FRB St. Louis, FRB Philadelphia, Tax Foundation

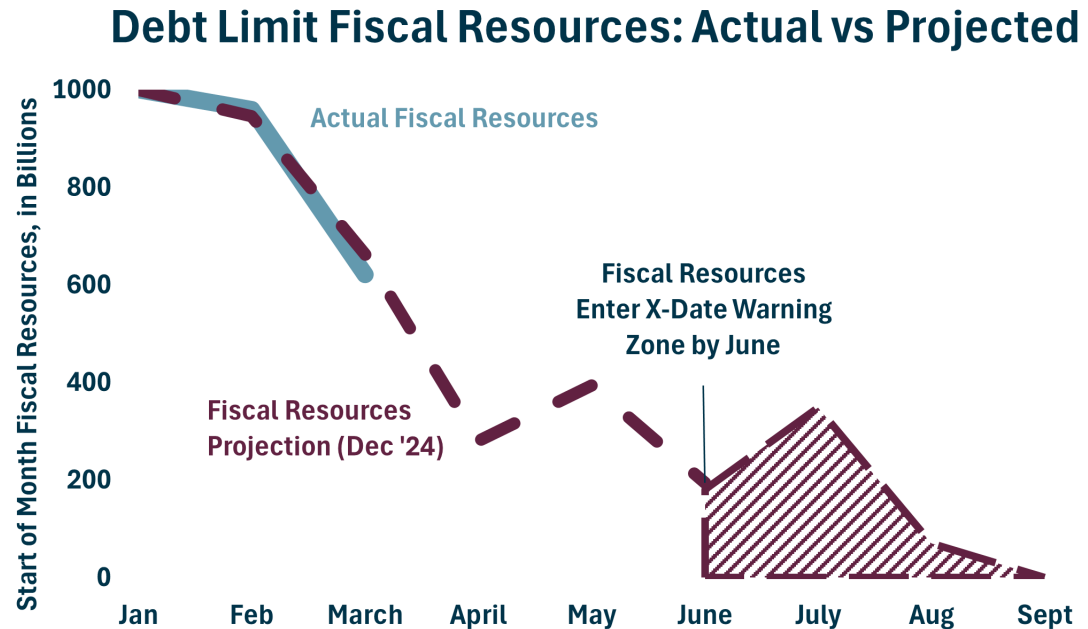
**Past performance is no guarantee of future results.** For illustration purposes only. Source: RiskBridge, FRBNY, FRBSL, FRBPH. The average nominal GDP growth (Real GDP plus PCE) of 5.2% from 2025 to 2027, using the assumed impact from announced and anticipated policies. Growth and inflation projections are subject to change without prior notice from RiskBridge. See Additional Disclosures at the end of this presentation.

"X" MARKS  
THE SPOT

## The debt ceiling limit must be raised in July-August

Stock market volatility  
tends to spike during  
debt ceiling debates

- Since January 2025, the Treasury Department has been operating under extraordinary measures to keep the government funded.
- The "X-Date" is when the debt limit must be increased to allow the Federal government to pay its obligations.



3.

## Structurally Higher Interest Rates

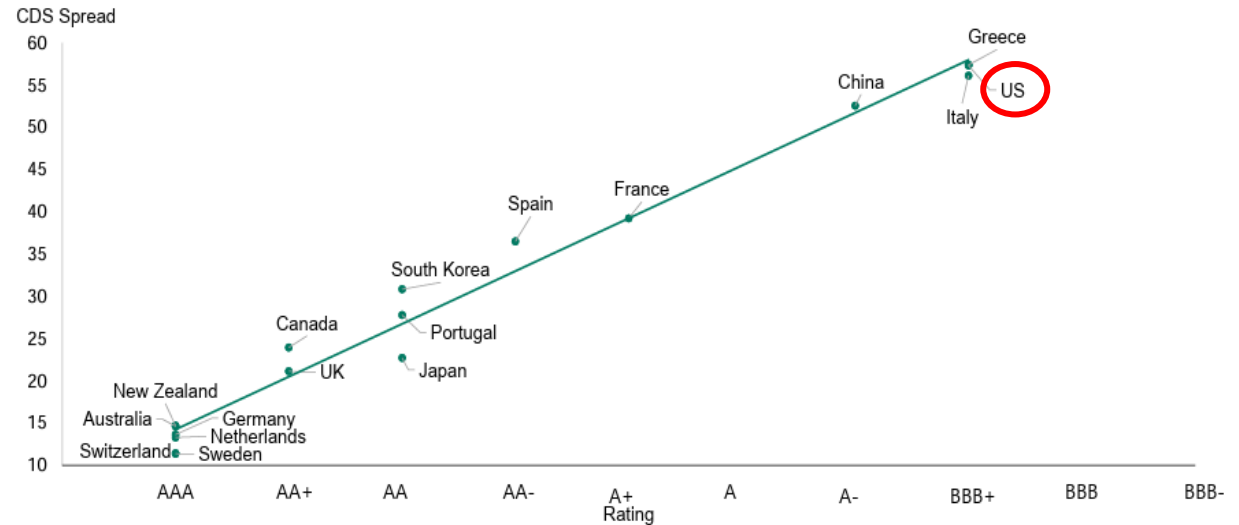
STRUCTURALLY  
HIGHER RATES

US Treasury  
debt (rated  
AA) trades  
like a BBB+

Investors are pricing in growing concerns around  
the unresolved debt ceiling

Sovereign CDS spreads vs sovereign credit rating

APOLLO



Data as of May 27th, 2025. Sources: S&P Capital IQ, Bloomberg, Apollo Chief Economist

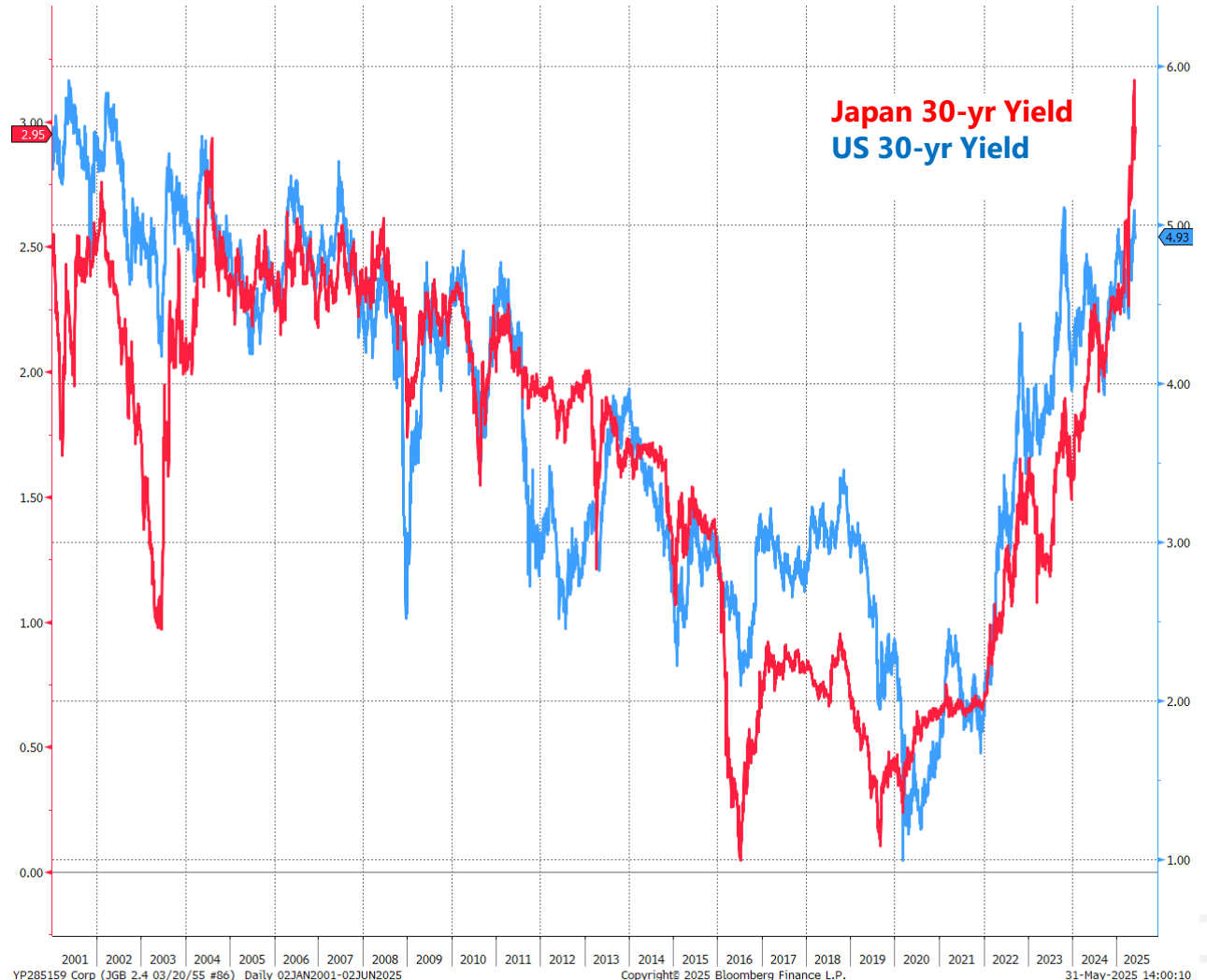


STRUCTURALLY  
HIGHER RATES

Not all macro  
factors  
impacting  
interest rates  
are  
homegrown

US Treasury yields are  
tethered to the global  
bond market

“Japan’s portfolio reshuffle raises red flag for US” – Reuters, 5/22/25



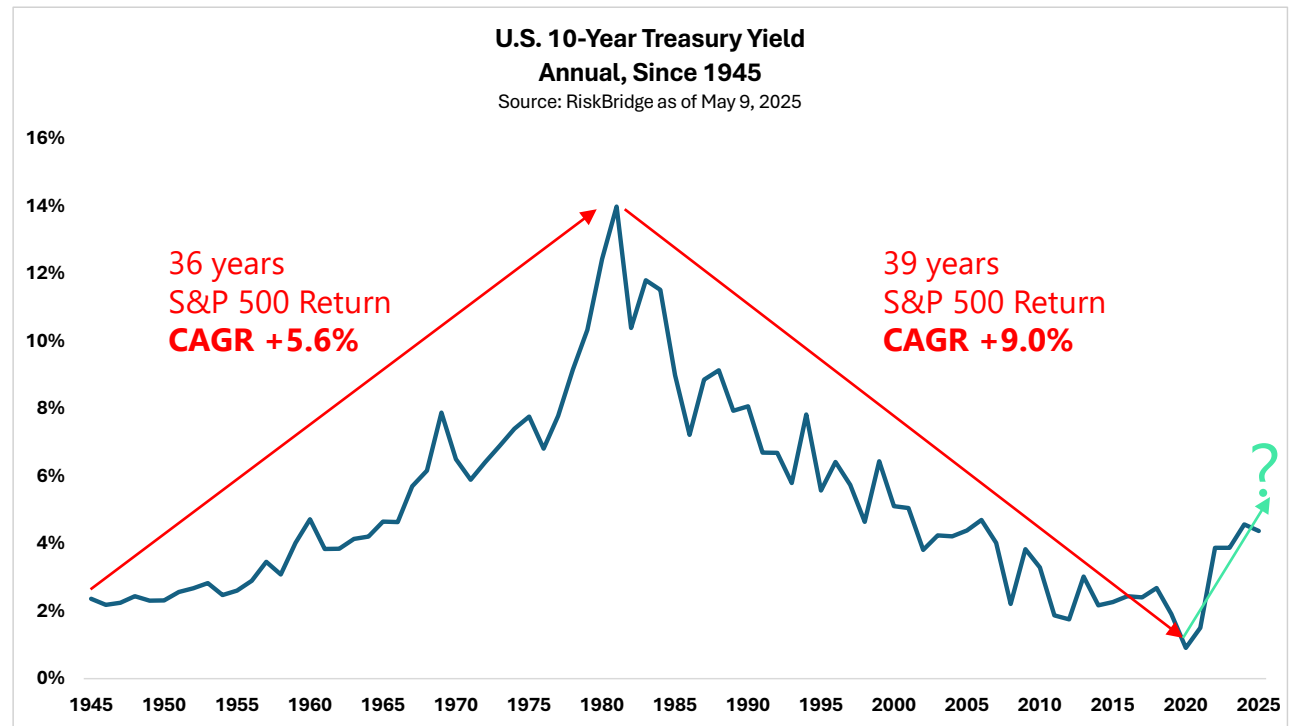
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## A QUICK HISTORY LESSON

**Rising  
interest  
rates tend  
to suppress  
investment  
returns**

History shows markets  
eventually adapt to new  
rate environments

**After 40 years of falling interest rates, RiskBridge believes we  
have entered a new structural regime of rising interest rates.**



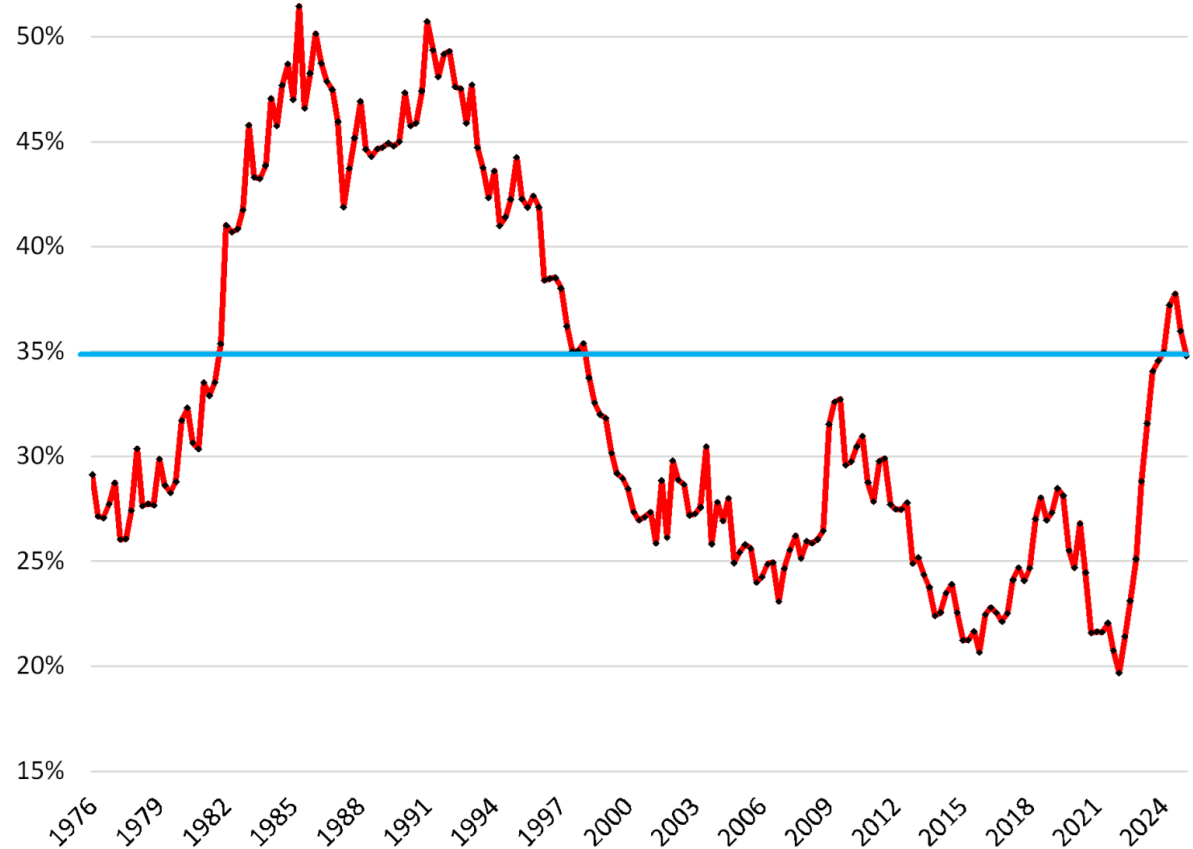
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# WAKING UP TO THE FISCAL MESS

**Interest  
expense  
consumes  
35% of  
Federal tax  
receipts**

History shows markets  
eventually adapt to new  
rate environments

**US Gov. Interest Payments as % of Tax Receipts**



Source: US Treasury Dept., BEA St. Louis Fed

WOLFSTREET.com

**Past performance is no guarantee of future results.** For illustration purposes only. Source: Bureau of Economic Analysis, 1Q 2025. The tax receipts series represents funds to pay for general budget expenditures and excludes funds to pay Social Security and disability contributions.

# 3.

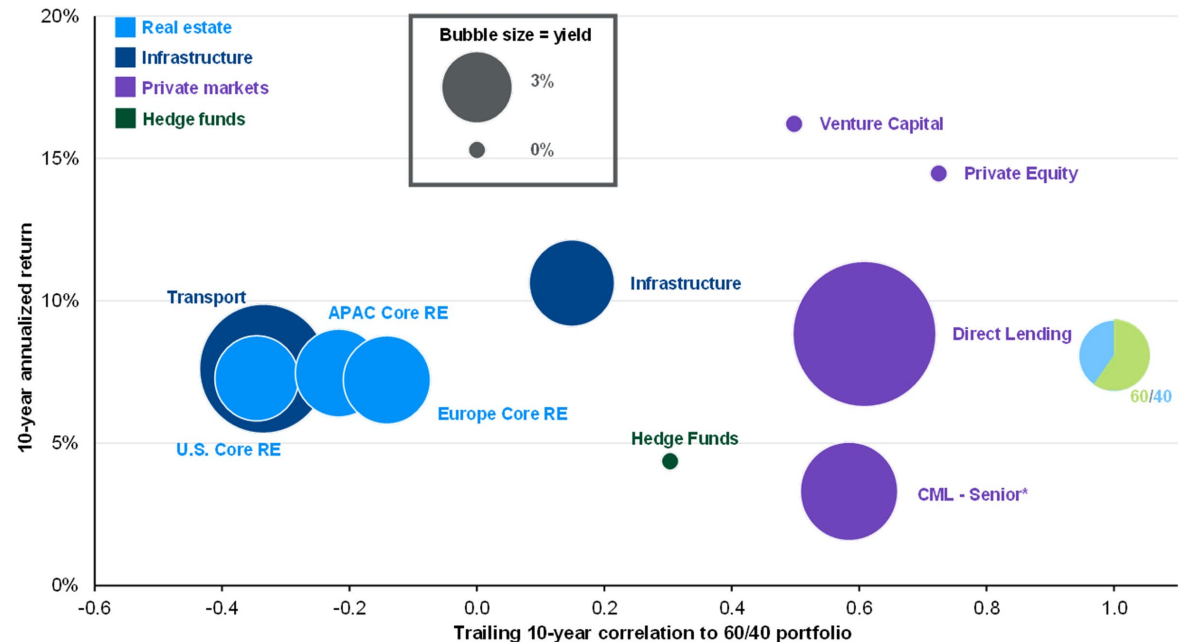
## The State of Private Markets

# PRIVATE MARKET INVESTING

Private markets and real assets tend to be less correlated to a traditional 60/40 portfolio

## Correlations, returns and yields

10-year correlations and 10-year annualized total returns, 4Q14 – 3Q24



**Past performance is no guarantee of future results. For illustration purposes only.** Source: JP Morgan Asset Management, Bloomberg, S&P. Data as of April 30, 2025. Source: Burgiss, Cliffwater, FactSet, Gilberto-Levy, HFRI, MSCI, NCREIF, J.P. Morgan Asset Management. Correlations are based on quarterly returns over the past 10 years from 4Q14-3Q24. A 60/40 portfolio is comprised of 60% stocks and 40% bonds. The S&P 500 Total Return Index represents stocks. The Bloomberg U.S. Aggregate Total Return Index represents bonds. 10-year annualized returns are calculated from 1Q14-4Q23. Asset allocation and diversification strategies do not guarantee a profit or protect against a loss. See Additional Disclosures at the end of this presentation.

# State of the Private Equity Market

— Macro environment — General partners (GPs) — Limited partners (LPs) Negative for PE industry Positive for PE industry

Metric	2019	2020	2021	2022	2023	2024
Interest rate (%) <sup>1, 2</sup>	2.2	0.4	0.1	1.7	5.0	5.1
Inflation rate (%)	3.5	3.3	4.7	8.6	6.7	5.8
Deal value (% year-over-year [YOY] growth)	2	-8	98	-22	-25	14
Deal count (% YOY growth)	4	3	41	-5	-18	-13
PE-backed exit deal value (% YOY growth) <sup>3, 4</sup>	-8	-11	54	-16	-6	-14
PE-backed exit deal count (% YOY growth) <sup>3, 4</sup>	-20	32	102	-54	-4	8
Median buyout entry multiples (purchase price/EBITDA) <sup>5, 6</sup>	10.0×	11.2×	11.8×	12.0×	11.2×	11.9×
Fundraising of close-end commingled funds (% YOY growth)	13	-10	36	-7	-12	-24
LP private equity target allocation (%) <sup>7</sup>	6.1	6.3	6.8	7.5	8.2	8.3
Capital calls in excess of distributions (% of distributions) <sup>4, 6, 8</sup>	25	23	3	20	23	-14
1-year pooled IRR for 2000–21 vintage funds (%) <sup>6</sup>	18	34	40	-8	6	4

**Past performance is no guarantee of future results.** For illustration purposes only. Source: McKinsey & Co., CEM Benchmarking; European Central Bank; Federal Reserve Bank of St. Louis; International Monetary Fund; MSCI; People's Bank of China; PitchBook; Preqin; StepStone Group Average annual central bank interest rate: effective federal funds rate is used as a proxy for North America, China's 1-year medium-term lending facility rate as a proxy for Asia, and European Central Bank's main refinancing operations rate as a proxy for Europe. PE-backed deals and exits include investments made by PE investors and other investors into mature companies and exclude venture capital data. Capital calls in excess of distributions and PE-backed exits are reported only for all PE. Median buyout entry multiples data reported only for global buyout. Buyout figures are displayed as a proxy for global all-PE. Capital calls in excess of distributions, IRR, and median buyout entry multiples data as of Q3 2024. LP PE target allocation data reported only for all global PE. A negative value indicates that distributions have exceeded contributions in such a year.



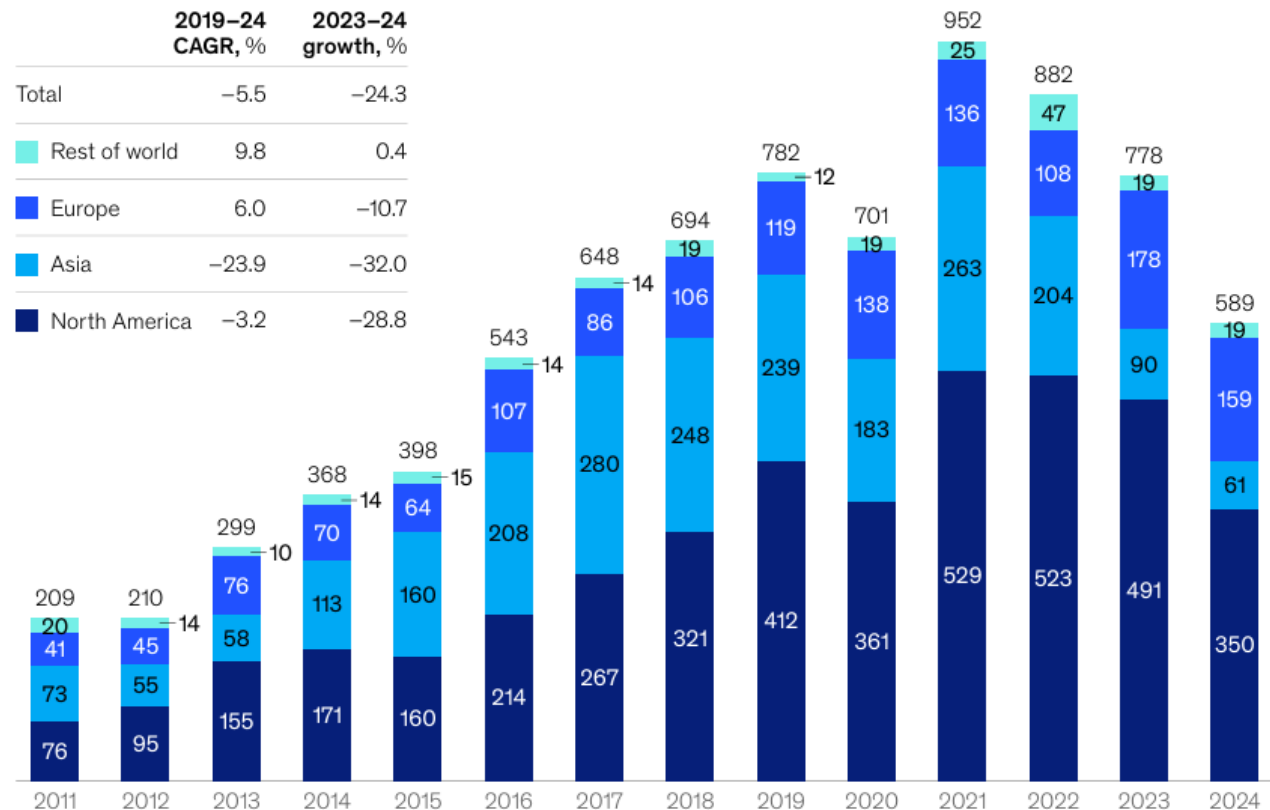
# PRIVATE MARKET INVESTING

**Private equity is turning to the individual investor to keep the fundraising machine churning**

M&A remains a key enabler of PE returns

**Private equity fundraising declined for the third consecutive year in 2024.**

Private equity fundraising, by region, \$ billion<sup>1</sup>



Note: Figures may not sum to totals, because of rounding.

<sup>1</sup>Includes buyout, growth, venture capital, and other private equity. Excludes secondaries, funds of funds, and co-investment vehicles.

Source: Preqin; McKinsey analysis

**Past performance is no guarantee of future results. For illustration purposes only.** Source: McKinsey.  
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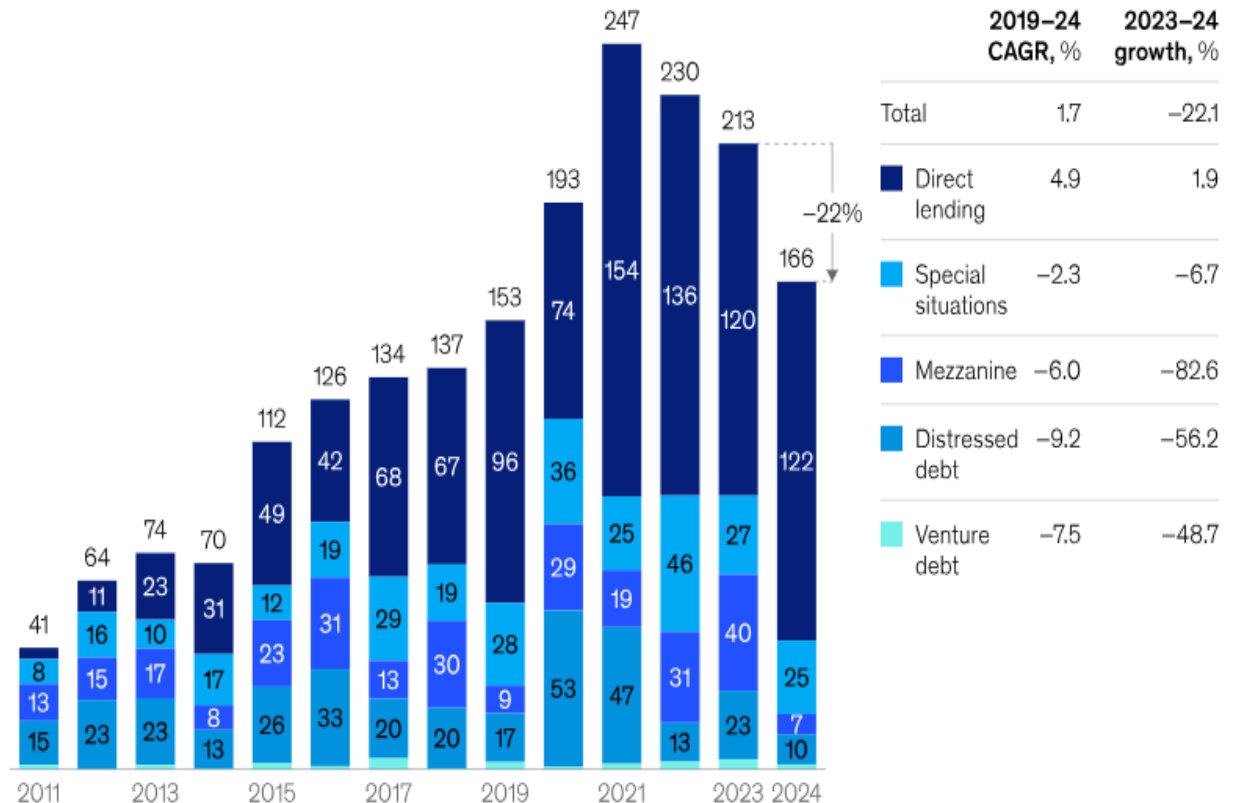
# PRIVATE MARKET INVESTING

**Private debt is turning to insurers and retail for new sources of capital**

The top 5 managers raised 38% of private debt funds in 2024

**Private debt fundraising declined 22 percent in 2024.**

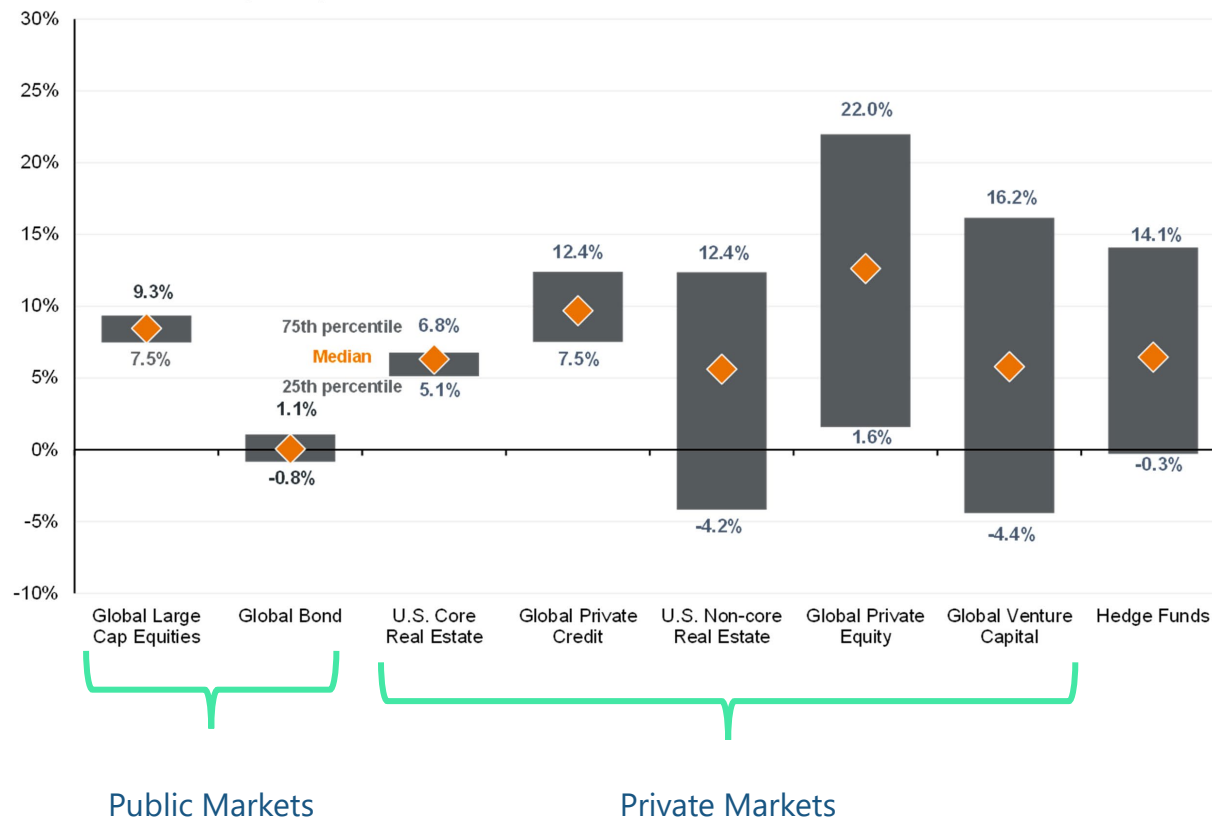
Global private debt fundraising, by substrategy,<sup>1</sup> \$ billion



**Past performance is no guarantee of future results. For illustration purposes only.** Source: JP Morgan Asset Management, Bloomberg, S&P. Data as of April 30, 2025. Source: Burgiss, Cliffwater, FactSet, Gilberto-Levy, HFRI, MSCI, NCREIF, J.P. Morgan Asset Management. Correlations are based on quarterly returns over the past 10 years from 4Q14-3Q24. A 60/40 portfolio is comprised of 60% stocks and 40% bonds. The S&P 500 Total Return Index represents stocks. The Bloomberg U.S. Aggregate Total Return Index represents bonds. 10-year annualized returns are calculated from 1Q14-4Q23. Asset allocation and diversification strategies do not guarantee a profit or protect against a loss. See Additional Disclosures at the end of this presentation.

## Private market investing requires experienced manager research and selection

**Public and private manager dispersion**  
Based on returns from 4Q14 – 4Q24\*



**Past performance is no guarantee of future results. For illustration purposes only.** Source: JP Morgan Asset Management, Source: Burgiss, NCREIF, Morningstar, Pitchbook, PivotalPath, J.P. Morgan Asset Management. Global Large Cap Equities and Global Bond are based on the Morningstar Global Large Stock Blend and Global Bond (not hedged) categories, respectively. U.S. Core Real Estate is based on the NCREIF Fund Index – ODCE. Global Private Credit are represented by Pitchbook fund data. U.S. Non-core Real Estate, Global Private Equity and Global Venture Capital are based on indexes from the MSCI Private Capital Universe. Hedge Funds are based on the PivotalPath index. \*Manager dispersion is based on annual returns over a 10-year period ending 4Q 2024 for: Global Large Cap Equities, Global Bond, U.S. Core Real Estate and Hedge Funds and the 10-year internal rate of return (IRR) ending 3Q 2024 for: Global Private Credit, U.S. Non-core Real Estate, Global Private Equity and Global Venture Capital. Asset allocation and diversification strategies do not guarantee a profit or protect against a loss. See Additional Disclosures at the end of this presentation.

# 4.

## Navigating Volatility

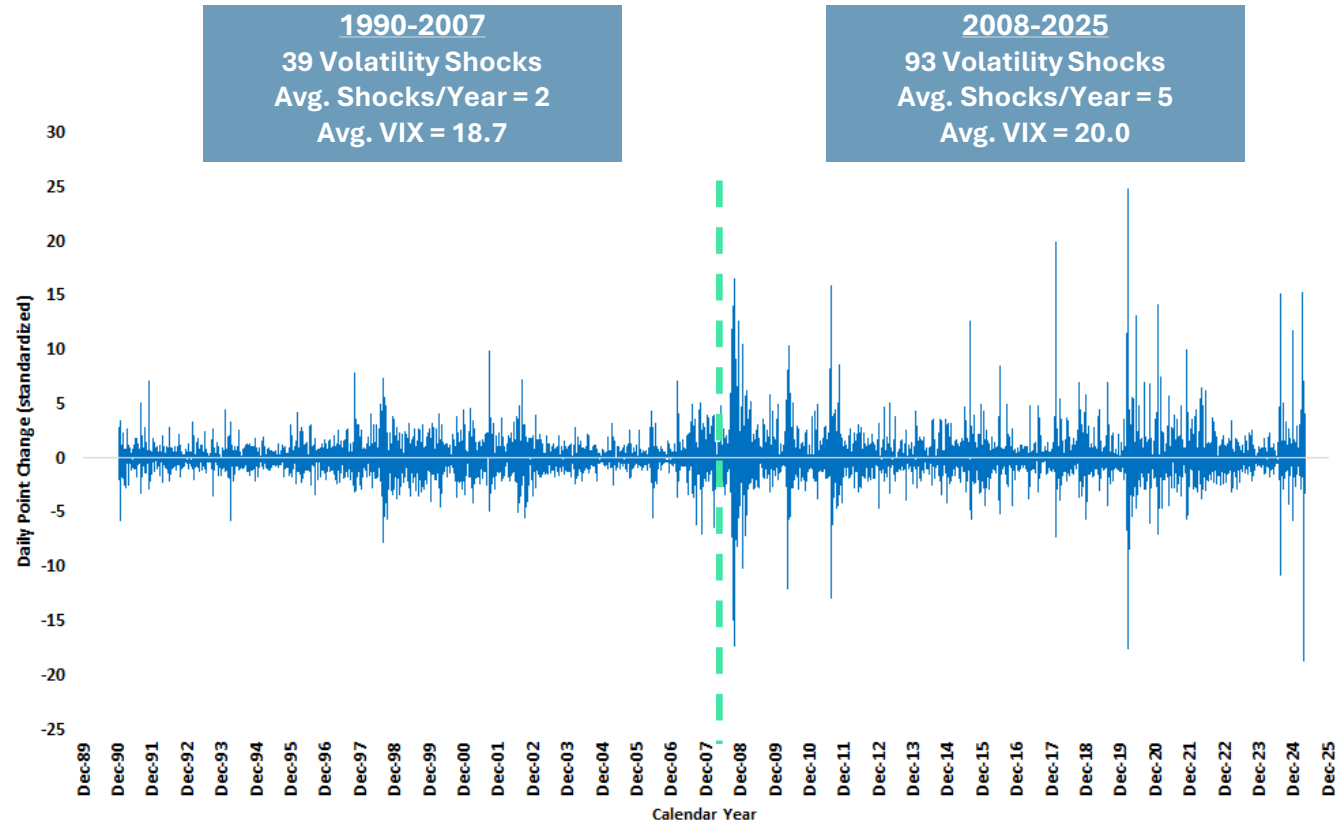
# NAVIGATING VOLATILITY

## The World is a Riskier Place

Market structure is less  
stable since the Global  
Financial Crisis (2008-09)

## Stock Market Volatility

VIX Daily Point Change (standardized)



**Past performance is no guarantee of future results.** For illustration purposes only. Source: Bloomberg. Calculations by RiskBridge. The index data above does not reflect the results of an actual client portfolio and does not reflect trading costs, transaction fees, commissions, or advisory fees. An investor cannot invest directly in an index. Asset allocation and diversification strategies do not guarantee a profit or protect against a loss. Updated 04/24/2025. See Additional Disclosures at the end of this presentation.

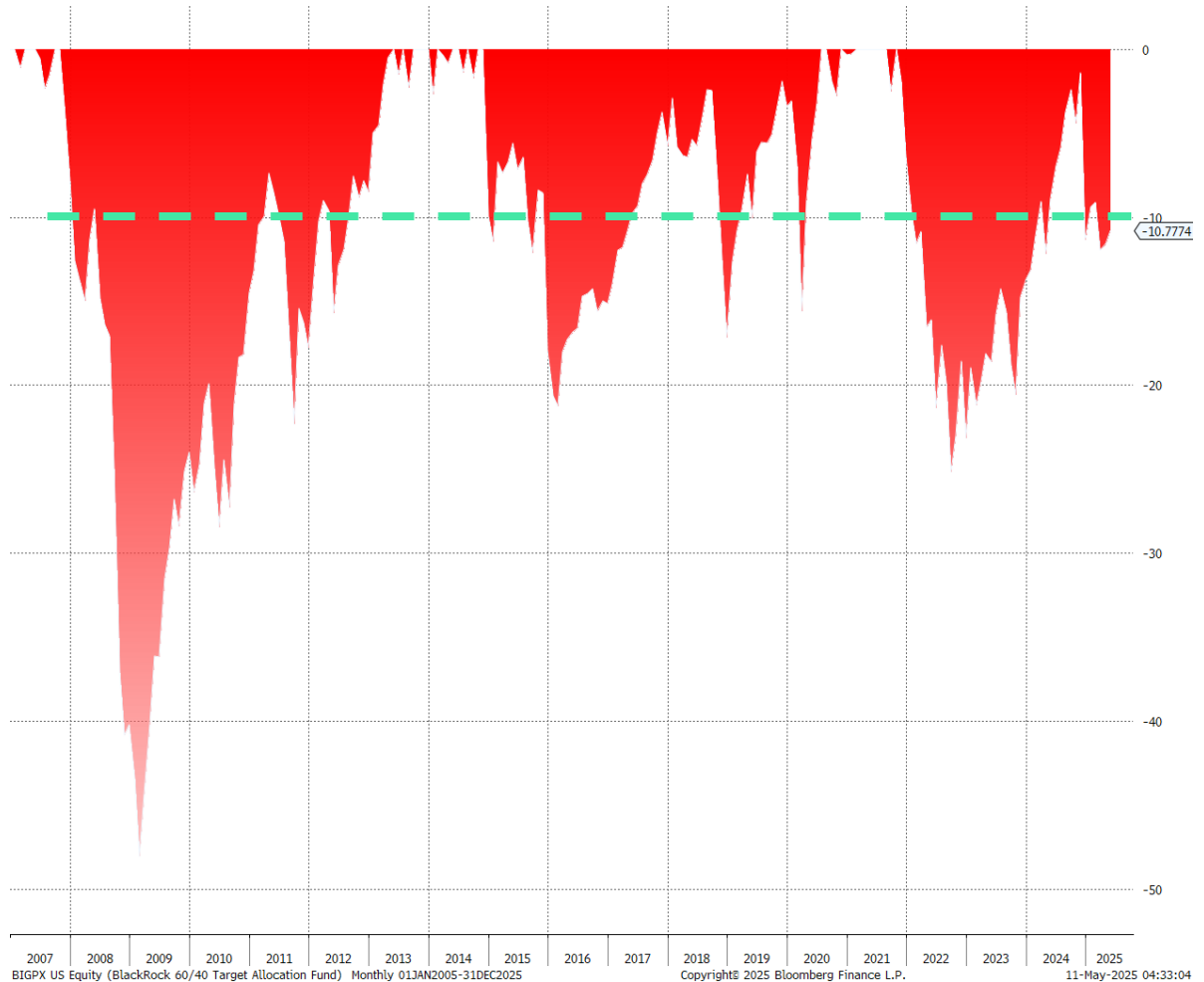
## NAVIGATING VOLATILITY

# Rising Stock Market Volatility Amplifies Portfolio Drawdowns

Aim to blunt the impact  
of market drawdowns

## Portfolio Drawdown

Traditional 60% equity/40% bond portfolio (2007-2025)



**Past performance is no guarantee of future results.** For illustration purposes only. Source: Bloomberg. The chart reflects the drawdown of the BlackRock 60/40 Target Allocation Fund (ticker BIGPX) since inception (12/21/2006). Drawdown analysis examines the magnitude, duration, and frequency of investment losses from peak to trough and aims to help investors understand potential losses. Asset allocation and diversification strategies do not guarantee a profit or protect against a loss. See Additional Disclosures at the end of this presentation.

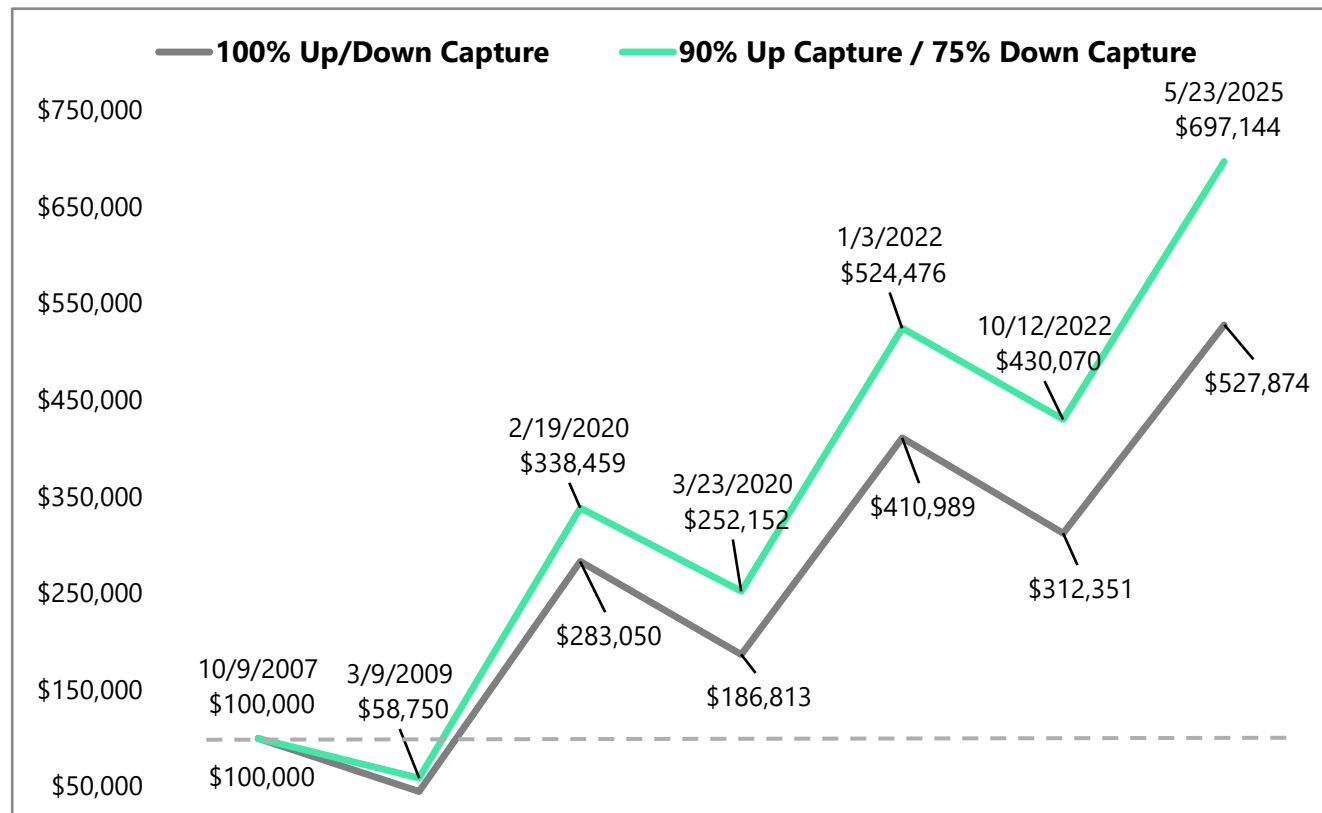


# DISCIPLINED PORTFOLIO CONSTRUCTION

## Winning More by Losing Less

### The Theory Behind RiskBridge's Approach

We believe diversification and minimizing losses, even at the cost of upside capture, can have a larger effect on the long-term return of a portfolio than full participation in both bull and bear markets

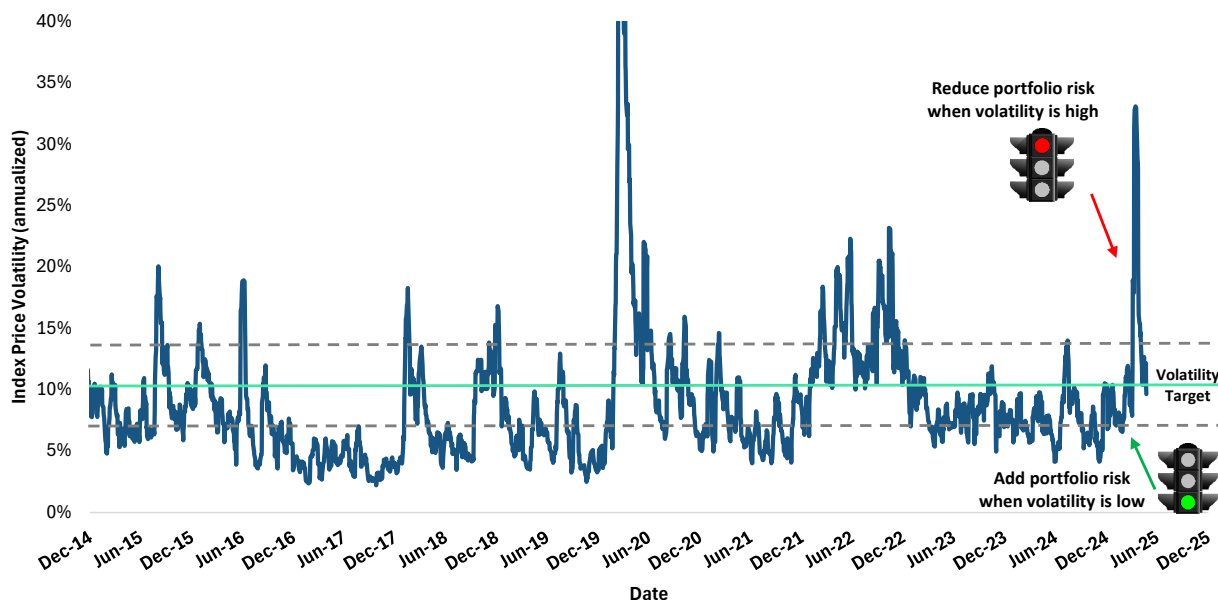


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**Dynamic risk management aims to keep the portfolio aligned with a predefined level of risk**

## Volatility of a Traditional 60/40 Portfolio

Annualized standard deviation of daily returns, 6-mo rolling periods



**Past performance is no guarantee of future results. For illustration purposes only.** Source: RiskBridge, Bloomberg, S&P. Volatility is represented by the 30-day realized volatility of the S&P Target Risk Balanced Index from 12/31/2014 to 05/23/2025. The index data above does not reflect the results of an actual client portfolio, does not reflect trading costs, transaction fees, commissions, or advisory fees, and actual results may vary substantially. It is not possible to invest directly in an unmanaged index. Asset allocation and diversification strategies do not guarantee a profit or protect against a loss. See Additional Disclosures at the end of this presentation.

# Turning Traditional Asset Allocation On Its Head

## RiskBridge Approach

Risk is actively managed

Solves for risk  
(controllable, predictable)

Minimizes negative  
surprises

Aligns with investors'  
holistic risk profile

vs

## Traditional Approach

Risk is a byproduct

Solves for return  
(uncontrollable,  
unpredictable)

Subject to market turbulence

Aligns with advisor's asset  
preferences and biases

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# Playbook for Navigating New Market Tipping Points

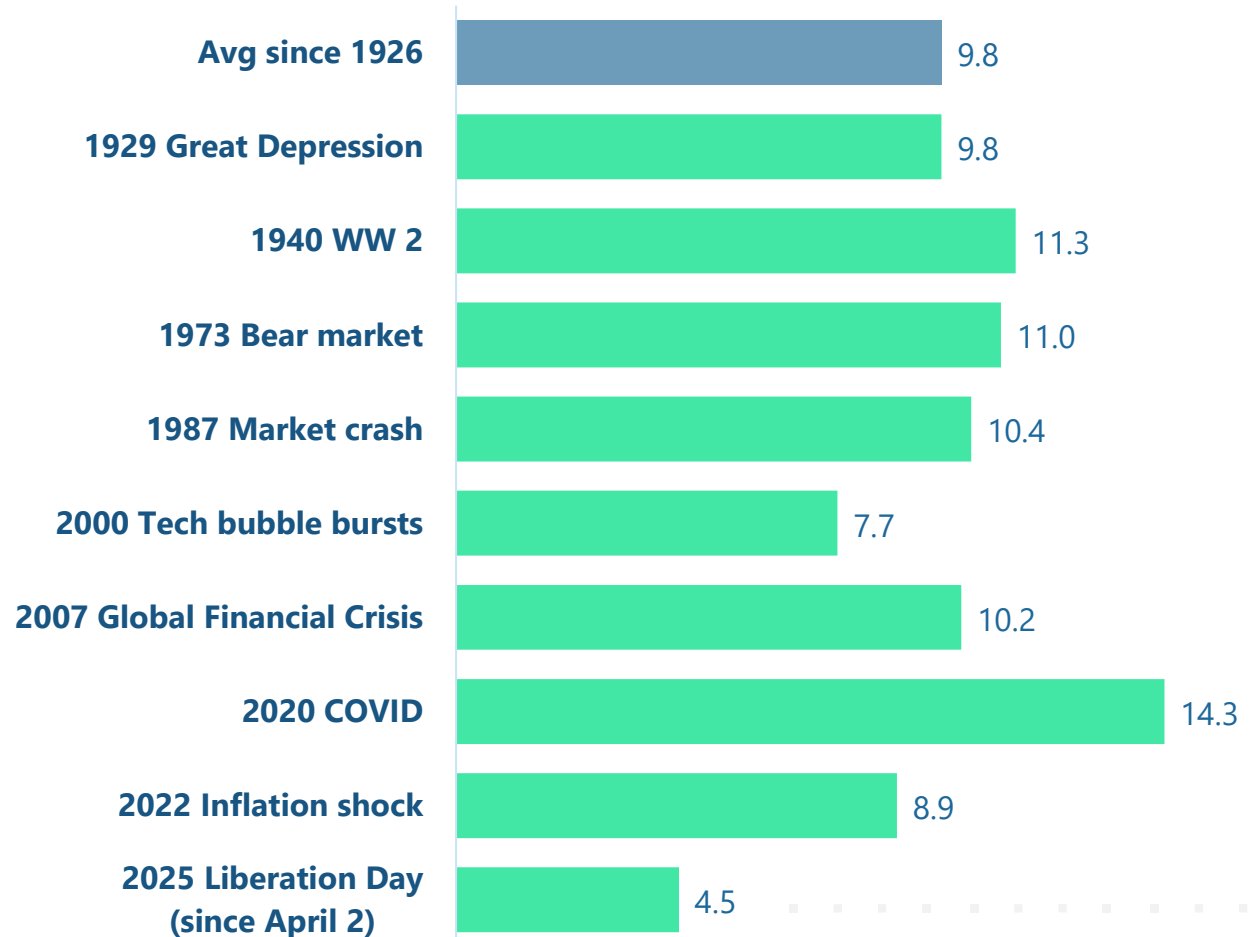
- For accredited investors, seek diversified return streams from private investments
- Dynamically manage portfolio risk
- Embrace volatility as a wealth-building opportunity
- Proactively plan for risk and volatility in your financial, estate, and business planning
- Rethink estate planning and “asset location” to protect assets from the uncertainty of future tax policies

FINAL  
INVESTMENT  
THOUGHT

There is  
always a  
reason to  
sell

The power of investing  
for the long term

## Average annual returns if you had been invested when events occurred (%)



**Past performance is no guarantee of future results. For illustration purposes only.** Source: RiskBridge, BlackRock, Bloomberg. The stock market is represented by the IA SSBI US Large Stock TR USD Index from 01/01/1926 to 12/31/1956 and the S&P 500 Index from 01/01/1957 to 05/23/2025. These indices are generally considered representative of the US stock market. It is not possible to invest directly in an unmanaged index. The index returns above do not reflect the results of an actual client portfolio, are gross of fees, and do not reflect trading costs, transaction fees, commissions, or advisory fees. See Additional Disclosures at the end of this presentation.

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**The MSCI ACWI ex USA (Net) Index (MSCI ACWI ex USA)** is a float-adjusted market cap weighted international equity index, which tracks stocks from developed market countries excluding the United States. The index is net of foreign withholding taxes and dividends, is unmanaged, and does not include the effect of fees. It's not possible to invest directly in an index.

**Bloomberg US Agg Index** is a broad-based flagship benchmark that measures the investment grade, US dollar-denominated, fixed-rate taxable bond market. The index includes Treasuries, government-related and corporate securities, MBS (agency fixed-rate pass-throughs), ABS and CMBS (agency and non-agency).

**Treasury Bill (T-Bill)** is a short-term US government debt obligation backed by the Treasury Department with a maturity of one year or less.

**VIX (VIX Index)** is a financial benchmark designed to be an up-to-the-minute market estimate of expected volatility of the S&P 500 Index and is calculated by using the midpoint of real-time S&P 500® Index (SPX) option bid/ask quotes. The VIX Index is intended to provide an instantaneous measure of how much the market thinks the S&P 500 Index will fluctuate in the 30 days from the time of each tick of the VIX Index.

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