

Alpha Capital Peer Universes

For Better Benchmarking

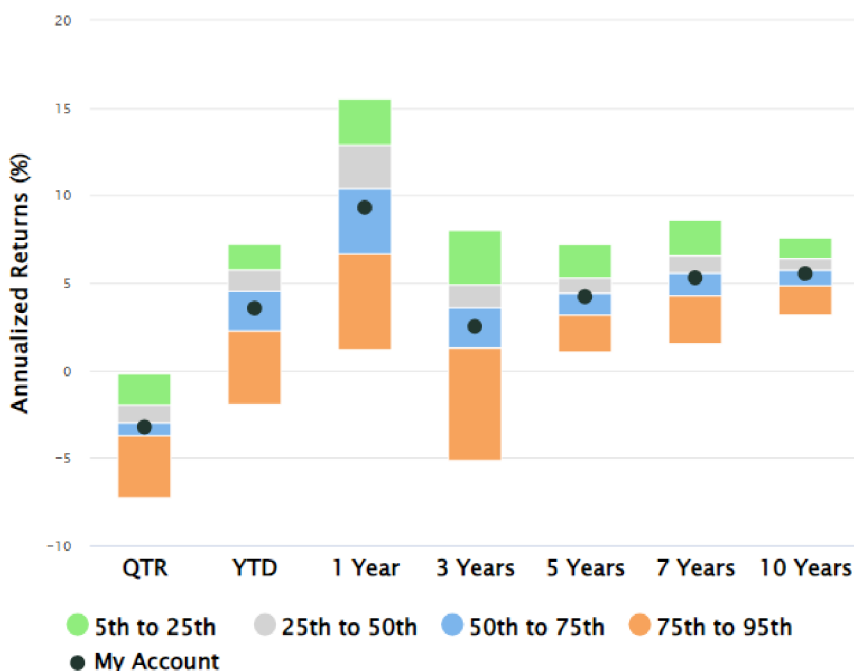


The peer universes platform was built to provide insights into portfolio performance and asset allocation as compared to over 1,200 institutions. This clarity empowers users to make knowledgeable decisions guided by unbiased, third-party analysis. Elevate your investment strategy with confidence, backed by data from a comprehensive peer universe.

First Risk-Based Peer Universes

This platform analyzes asset allocation across 25 asset classes to categorize institutions into five distinct risk universes. This approach ensures that comparisons are made between portfolios with similar risk profiles. By emphasizing both asset allocation and risk metrics, the creation of peer universes is refined to offer a more accurate reflection of investment strategies, providing benchmarks that are genuinely indicative of comparable investment approaches, enabling enhanced strategic planning based on precise and insightful data.

Alpha Capital Peer Universes
(All Client Types, All Risk, All Account Sizes)
As of Date: Q3/2023



	QTR	YTD	1 Year	3 Years	5 Years	7 Years	10 Years
5th Percentile	-0.20	7.20	15.50	8.00	7.19	8.59	7.57
25th Percentile	-1.99	5.72	12.86	4.87	5.26	6.53	6.37
Median	-3.01	4.50	10.36	3.57	4.39	5.55	5.71
75th Percentile	-3.74	2.25	6.64	1.26	3.15	4.25	4.83
95th Percentile	-7.27	-1.93	1.18	-5.14	1.04	1.51	3.17
Institutions	1,328	1,209	1,183	692	559	320	239
My Account	-3.24 (58)	3.55 (64)	9.31 (60)	2.51 (66)	4.21 (56)	5.29 (62)	5.53 (58)



Advancing Industry Transparency

With fifty leading investment firms contributing performance data that is net of all fees from more than 1,200 institutional clients combined with our industry-leading asset allocation and client type analysis, our platform offers a wealth of valuable data at a fraction of the cost of other peer universes in the market.



Benchmarking: Compare performance and asset allocation across different client types.



Risk: Use five prebuilt risk profiles to build more relevant Peer Universes. The first tool for apples-to-apples comparisons.



Asset Allocation: Ours is the only peer universe with uniform asset class metrics.



Performance: Analyze net of all fees performance to get bottom-line results.



Size: Drill down into similar sized institutions for more granular data.

Alpha Capital Peer Universes Asset Allocations
All Client Types, All Risk, All Account Sizes - As of Q3 2023

