

Plans can't quickly and easily adjust their exposure to Commercial Real Estate in line with their target allocations.



DOWN/UP EQUITY TRUST SECURITIES

Real Estate Markets are cyclical by nature; neither regular nor predictable. Your Real Estate Portfolio doesn't have to be.

Are Your Real Estate Allocations Out Of Line With Targets?

Market Situation:

Plans allocate significant assets to Commercial Real Estate. After deciding on a strategic real estate allocation target, the plan then either invests in RE commingled funds or separate accounts. Sometimes this results in non-targeted allocations that require rebalancing an illiquid asset class.

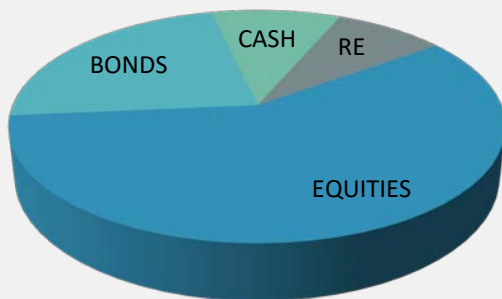
Investment Problem:

Most plans benchmark their Commercial R.E. allocations against the NCREIF NPI or ODCE Index. Each fiduciary plan sets a target allocation to R.E.. But with changing market conditions, allocation can result in over/under weighting and un-invested cash. Currently there is no efficient investment tool to bring these allocations back into balance and fully invested.

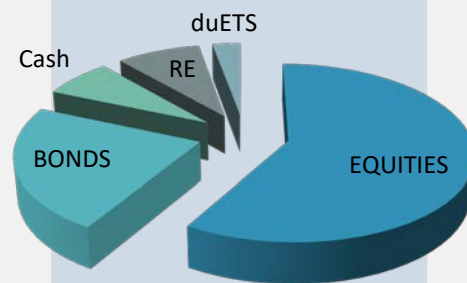
Investment Solution:

Thru the utilization of duETS US Commercial Down and Ups, the Plan and/or OCIO can more cost effectively and efficiently bring back allocations into target range without having to buy or sell real property.

Allocation Before duETS



Allocation with duETS



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