

# Systematic Process



## Designing the Optimal Equity SMA

Evestia's research process is grounded in a systematic approach that draws on decades of industry knowledge and empirical evidence. We employ robust quantitative analysis to identify and utilize factors that have consistently demonstrated the ability to reduce risk and enhance returns.

The quality and risk factors are used in all of Evestia's active stock SMA's. Evestia provides strategies for all nine US style boxes by varying the weights of value, growth, and size. The S&P 500 is the starting point for US Stock SMA's. ADR's are used for SMA's with foreign exposure. All holdings are equally-weighted.



“advisors don't want to sell someone else's active management strategy packaged in a fund the client could just buy themselves”

Michael Kitces



### 20-30 Stock Portfolio

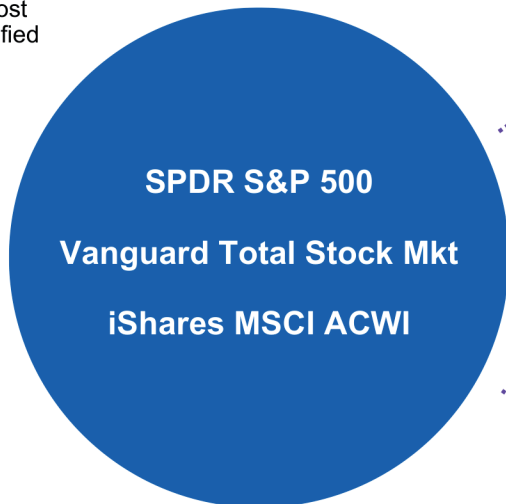


# Core-Satellite Approach



## Core Beta ETF's

- Low Cost
- Diversified
- Liquid



## Active Stock SMA

- Higher Return Potential
- Possible Risk Reduction
- Transparent Holdings



## Direct Indexing

- Employee Stock
- Tax Loss Harvesting
- Tax Efficiency



## Alternatives

- Lower Correlation
- Higher Returns
- Liquid

## Evestia Strategies

US Equity Style Box SMA's	Fee	Target Risk SMA Series	Fee
Active Mega Cap Core	25 bps	Evestia 20/80 Preservation	20 bps
Active Mega Cap Growth	25 bps	Evestia 40/60 Conservative	20 bps
Active Mega Cap Value	25 bps	Evestia 60/40 Balanced	20 bps
Active Large Cap Core	25 bps	Evestia 80/20 Growth	20 bps
Active Large Cap Growth	25 bps	Evestia 100/0 High Growth	20 bps
Active Large Cap Value	25 bps		
Active Mid Cap Core	25 bps		
Active Mid Cap Growth	25 bps		
Active Mid Cap Value	25 bps		
International SMA Series	Fee	Beta Diversifiers ETF Series	Fee
Active International Stock	25 bps	Access Cash	5 bps
Active Global Stock	25 bps	Access Commodities	5 bps
		Access Core Bond	5 bps
		Access International Equity	5 bps
		Access Muni Bond	5 bps
		Access Real Estate	5 bps
		Access Core Equity	5 bps
		Access Small Cap Equity	5 bps
Active Direct Index Series	Fee		
Active Direct Index SMA	25 bps		

Ready to learn more?

[evestia.com/get-started](https://evestia.com/get-started)

[hello@evestia.com](mailto:hello@evestia.com)

801.960.3228