

## S&P PRISM Index

**Objective** Seeks to look beyond volatility, evaluate several market indicators and strategically allocate for diversification and consistent performance.

**Approach** Multifaceted, rules based strategy that takes into account key market indicators, risk and momentum.

**Holdings** Diversified asset classes across US Equities, US Bonds and Commodities, like oil and gold, while maintaining a 5.5% volatility target.

**Ticker** SPPRISME

### Designed by S&P® Dow Jones® Indices

- Over 125 years of experience constructing innovative and transparent solutions
- More than \$7.1 trillion in assets indexed to the S&P 500
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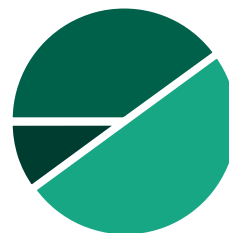
Source: S&P Dow Jones Indices as of 12/31/22

### Daily Rebalancing Process



#### STEP 1 Analyze

The Index analyzes market indicators and volatility for each asset class daily



#### STEP 2 Select & Weight

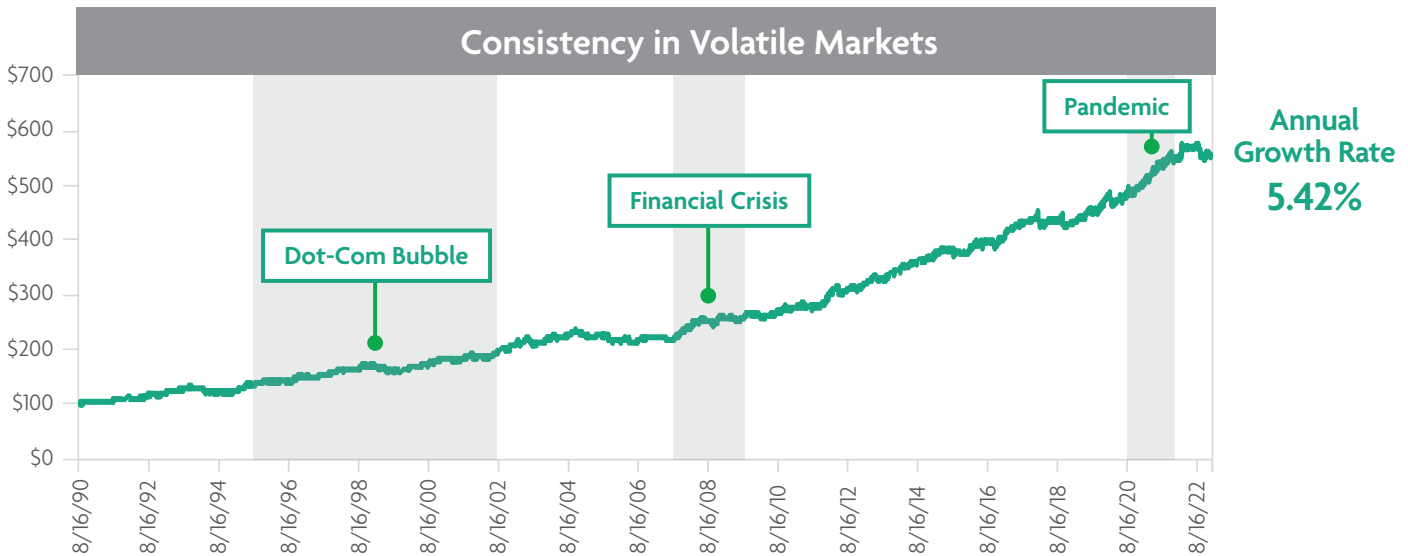
The Index then selects and strategically weights the asset classes to achieve greater stability

- Equities
- Bonds
- Commodities

### Last 20-Year Annual Returns

Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Annual Return	5.19%	5.59%	-5.92%	2.46%	6.59%	10.73%	0.44%	4.06%	5.29%	8.47%
Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Annual Return	10.97%	6.31%	1.47%	6.97%	9.69%	-1.24%	9.64%	5.61%	10.19%	0.35%

Annual returns reflect excess returns. Data shown is for historical purposes only, does not represent an actual account, and is not the result of any actual trading. Actual investment outcomes may vary. Historical index performance is no guarantee of any future performance. For the full backtested performance, please visit <https://www.spglobal.com/spdji/en/indices/strategy/sp-prism-index/>.



Source: From 8/16/90 to 12/31/22. The index performance shown is hypothetical and for illustrative purposes only and does not represent the performance of a specific product. The S&P PRISM Index was established on 2/12/18. Performance before this date is back-tested. Hypothetical performance is back-tested by applying the Index methodology to historical financial data when all components were available and was designed with the benefit of hindsight. Back-tested performance is hypothetical and has been provided for informational purposes only. Past performance is not a guarantee of any future performance.

To learn more about the S&P PRISM Index, contact your financial professional or visit <https://www.spglobal.com/spdji/en/indices/strategy/sp-prism-index/>

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