nuveen
A TIAA Company

INTRODUCING

# nSights

*Portfolio analysis*

**You want the best outcomes for your clients …** and are faced with managing portfolio risk, evaluating a growing universe of investment choices and addressing increasingly complex client needs — with limited time.

**We can help you…**

- Define the types of risk and evaluate them accordingly.
- Assess your portfolio at both the asset class and manager levels.
- Consider how adding a particular strategy can impact portfolio results.
- Offer optimal allocations based on your clients' needs.

All from a team of knowledgeable and experienced experts who can help you deliver investment outcomes your clients want and need.

**Nuveen's Portfolio Strategy and Solutions Team can be your partner, delivering personalized insights** for your client portfolios through robust portfolio reviews.

**nSights** analysis can support your efforts to better manage risk and stress test your portfolio. It can also help you understand the opportunities and implications of various portfolio decisions.

# What we hear from advisors

> *How can I generate income for clients, without taking on too much duration or credit risk?*

> *How can I see my portfolio's ESG score and how to improve it?*

> *Can you explain how inflation or rising interest rates may impact my portfolio and ways to better manage this risk?*

> *I'm exploring private assets, can you model my portfolio to see whether they'd improve return, yield or volatility?*

> *I've had a purposeful U.S. home bias for some time now, is it time to reallocate outside the U.S. equity market?*

# How can we help?

- Provide professional analysis of client portfolios and guidance in positioning for long-term client outcomes
- Provide concrete action steps and easily understood rationale
- Strengthen your client relationships through discussions of historical performance and the capital markets assumptions that could impact future performance
- Partner with you to effectively compete and grow your business

# Our process starts and ends with investor outcomes

## 1 Define priorities and desired outcomes

*Identify primary goals*

- Growth
- Income
- Improved diversification
- Capital preservation

## 2 Comprehensive and differentiated nSights analysis

- What factors are driving risk?
- What underlying asset classes are driving your risk?
- How might your portfolio react in periods of market stress?

### Sample report: What managers are driving your risk, and why?

SAMPLE REPORT:

| | | | | | Marginal Contribution to Factor Risk (100x) | | | |
|---|---|---|---|---|---|---|---|---|
| | Weight (%) | Portfolio risk constribution | Portfolio risk constribution (%) | Marginal Contribution to Risk* (100x) | Equity | Credit | Currency | Rates |
| **Total Portfolio** | **100%** | **14.69** | **100%** | **14.7** | **11.7** | **0.8** | **0.4** | **-0.3** |
| Fund A (Growth Equity) | 35% | 8.56 | 58% | 28.0 | 18.5 | | 0.4 | 0.0 |
| Fund B (Core Plus Fixed Income) | 18% | 0.41 | 3% | 2.6 | | 1.6 | 0.1 | -0.4 |
| Fund C (Core Plus Fixed Income) | 18% | 0.33 | 2% | 2.1 | 0.0 | 1.3 | 0.2 | -0.5 |
| Fund D (International Equity) | 17% | 2.43 | 17% | 16.0 | 7.6 | | 0.8 | |
| Fund E (Mid-Cap Growth Equity) | 12% | 2.97 | 20% | 28.4 | 6.1 | | 0.0 | 0.0 |

For illustrative purposes only.

## 3 Discussion focused on aligning your portfolio with your goals

*We pull together our understanding of your goals and the results of our analysis to proactively highlight concentrations, biases and risks in your portfolio and opportunities for enhancements. We strive to give you at least 3 ideas to consider.*

- Portfolio characteristics, including forward-looking return and volatility statistics
- Historical return analysis
- Stress testing and scenario analyses
- Risk analysis to understand the macro factors and manager exposures driving performance

## Meaningful analytics, insightful analysis

Our team brings together Nuveen's best thinking and partners with you to tackle the topics we know are important to you:

- Perform an objective review of your asset allocation
- Align your portfolio to balance performance, risk, and liquidity needs
- Talk through additional portfolio ideas

And at the center of every decision, is your client's goals.

## Nuveen, partnering with you for portfolio solutions

### Our best thinking

- **nSights** portfolio analysis
- Thought leadership
- Asset allocation views

### Model portfolios

Off-the-shelf asset allocation portfolios spanning a wide range of investment objectives

### Custom portfolios

Portfolios designed to meet your specific objectives and reflect our best ideas

**For more information, call 1.800.752.8700 and visit nuveen.com.**

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**Portfolio allocation will be principally to funds managed by affiliates and to affiliated sub-advisers, which may present a conflict of interest.**

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