



SIGMA Portfolio Series

A diversified, professionally managed portfolio in a single package



SIGMA Portfolios offer a disciplined and diversified approach to investing for the long-term. Choose from among 7 levels of risk to design an appropriate balance of risk vs. potential return. Envestnet | PMC seeks top managers among all asset classes and fashions a strategic mix—with institutional access and pricing for cost-effective portfolio management.

Portfolios are regularly monitored and rebalanced, delivering professional management that’s matched to each investor’s risk tolerance.

Building Blocks for a Diversified Portfolio

Asset allocation models grounded in a rigorous analytical process, identifying best-of-breed managers, monitoring risk exposures, and systematically rebalancing portfolios is our formula for generating long-term, risk-adjusted returns.

Strategic Asset Allocation

Optimized asset allocated portfolios based on reasonable long-term capital market forecasts helps guard investors from making decisions based on emotion, market timing, or chasing hot returns that can erode performance.

Professional Management

To maintain the integrity of the risk and return profile of each portfolio, an experienced team of portfolio managers and due diligence analysts monitors allocations, risk exposures, and the quality of underlying managers.

Affordability

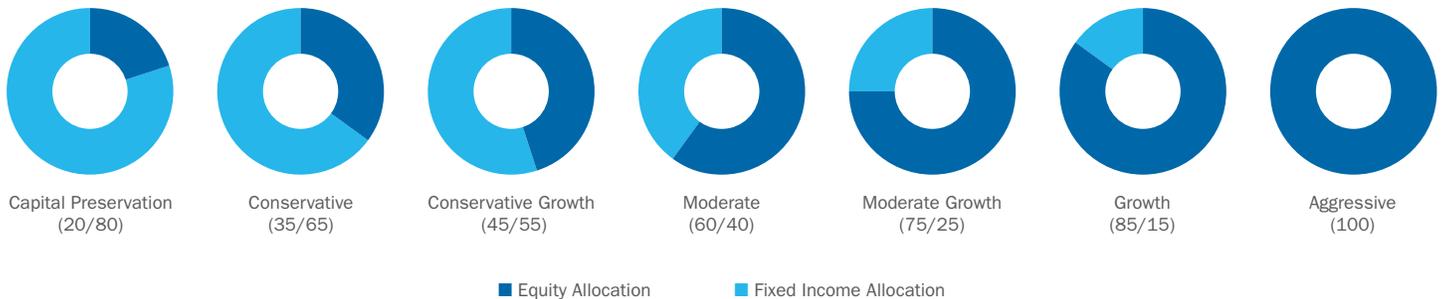
Low investment minimums give an investor entree to an institutional quality portfolio at a reasonable cost.

Access and Liquidity

The third-party mutual funds used in SIGMA portfolios are liquid, and provide investors access to a wide range of global investments that otherwise may be unavailable.

Strategic Portfolios for Every Level of Risk Tolerance

7 Target Allocation Strategies

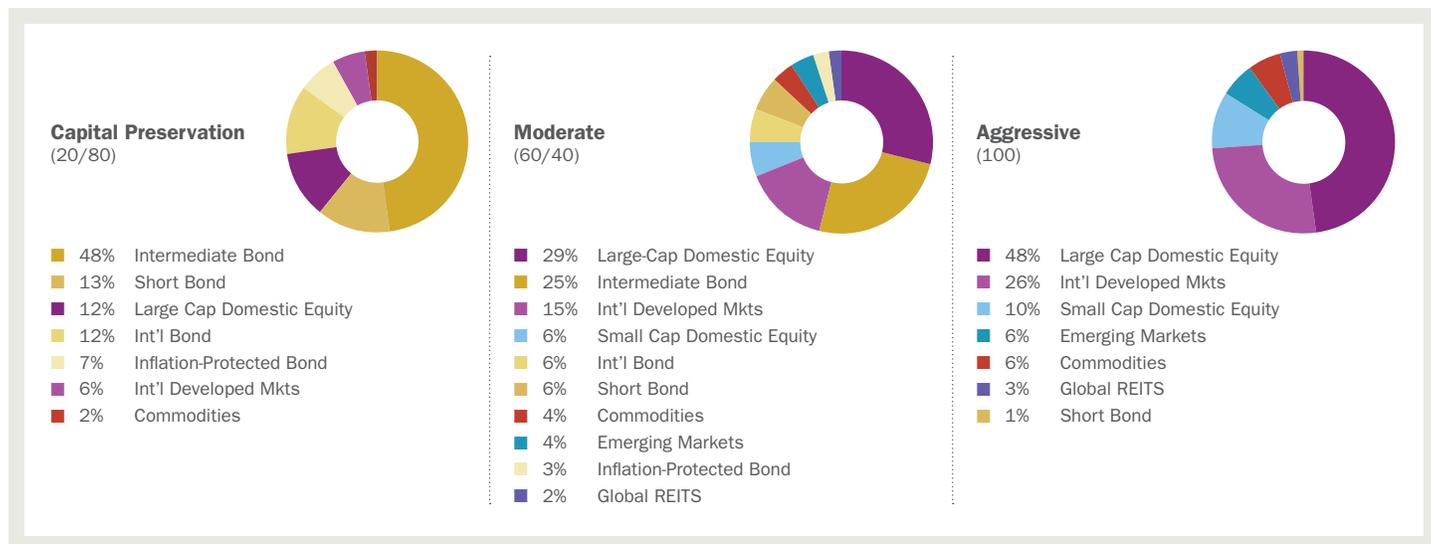


*The SIGMA Portfolios are also available as tax-sensitive models.

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Sample Allocations



Features of the SIGMA Portfolios

Unbiased Manager Selection

Portfolios at each risk level are constructed by objectively assessing and combining professional, third-party managers.

A Heritage of Expertise

Portfolios have a history of successful manager selection and performance—a record that is consistent since our inception.

Versatility

Portfolios are available across global markets and the entire risk spectrum, and include taxable and municipal fixed income options.

Active Management

Portfolios are actively managed, regularly monitored, and systematically rebalanced. They follow a strategically allocated, fund-of-funds approach based on complementary management styles.

Insight

Portfolio construction employs an institutional methodology, and draws upon Envestnet | PMC's forward-looking capital markets assumptions and asset allocation strategies.

A Disciplined Approach to Portfolio Construction

The SIGMA Portfolios deliver a disciplined and diversified approach to investing for the long-term—with strategic solutions available for every level of risk tolerance.

For more information, visit www.envestnetpmc.com today.

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Investments in smaller companies carry greater risk than is customarily associated with larger companies for various reasons such as volatility of earnings and prospects, higher failure rates, and limited markets, product lines or financial resources. Investing overseas involves special risks, including the volatility of currency exchange rates and, in some cases, limited geographic focus, political and economic instability, and relatively illiquid markets. Income (bond) funds are subject to interest rate risk which is the risk that debt securities in a fund's portfolio will decline in value because of increases in market interest rates.

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