

**DIVERSIFIED EQUITY FUND REVIEW**  
**Worksheet**

<b>Preferred Options</b>	<b>Options to Dismiss</b>	<b>Unsure</b>
1.		
2.		
3.		
4.		

<b>Product</b>	<b>Details</b>
Smaller companies	Smaller companies are expected to outperform larger companies over the long-term, albeit with higher volatility
Emerging markets equities	Emerging markets now represent approximately 13% of the world market capitalization are expected to be the engine of growth for the global economy
Low-volatility strategies	<ul style="list-style-type: none"> <li>• This type of strategy typically has low sensitivity to market movements and thus provides stronger relative performance in down markets</li> <li>• The strategy can either be constructed by focusing on companies with low leverage and that operate in stable businesses; or by focusing on shares that are less volatile</li> </ul>
Real estate	Involves purchasing income producing properties
Infrastructure	Involves taking ownership in roads, utilities, transport, water, ports, railroads, communication systems, etc.
Private equity	Involves investing in companies that are not listed on a stock exchange
Active currency management	Involves trading a basket of currencies.
Global tactical asset allocation	Multi-strategy approach that seeks to add value based on views about the economy. The strategy incorporates asset class, country, sector, and currency opportunities
Commodities	Strategy that involves investing in a basket of commodity futures, such as oil, natural gas, gold, copper, zinc, coffee, livestock, wheat, etc.
Market neutral strategies	Strategies that involve taking both long and short positions in stocks to minimize the exposure to some of the stock market risks
Long/short strategies	Strategies that combine a conventional portfolio with a market neutral strategy