



WEALTHSHIELD

FIVE FAST FACTS

NOVEMBER 2021

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WTI CRUDE OIL PRICE CLOSES AT ~\$67/BBL.

WTI traded up to nearly \$85/bbl during the month of November; however, it closed the month around \$67/bbl. WTI Crude was down nearly 20% for the month.



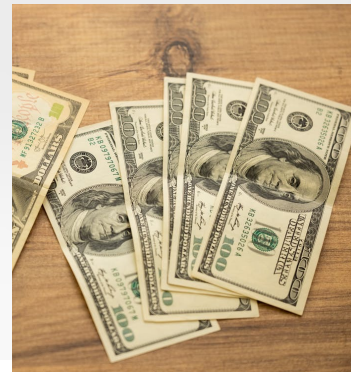
NEW COVID VARIANT DISCOVERED.

The new variant, Omicron, is still very young with little known about it. That said, President Biden said omicron is a “cause for concern, not a cause for panic”. Additionally, Federal Reserve Chair Jerome Powell said the new variant poses downside risks to employment and growth while adding uncertainty around inflation.



PRESIDENT BIDEN NOMINATES NEXT FEDERAL RESERVE CHAIRMAN.

The president announced his intent to nominate Jerome Powell as Federal Reserve chairman. This would be Jerome Powell’s second term as chairman. President Biden also announced his intent to nominate Lael Brainard as the Fed’s vice chairman.



OCTOBER CONSUMER PRICE INDEX (CPI) SURGES YEAR OVER YEAR.

CPI increased 6.2% YoY in October. This was the largest increase since 1990. There were many factors contributing to rising inflation, but notable drivers were higher fuel costs, supply chain issues and higher rents.



FEDERAL RESERVE ANNOUNCES TAPERING PLANS.

The Federal Reserve announced that it will start tapering its asset purchases; this was expected by market participants. Fed Chair Jerome Powell also indicated that tapering does not imply a rate hike will occur anytime soon. Rate hike decisions will have to be made with consideration of inflation and labor market data.

Sources: Bloomberg

Disclosure: This information is provided for educational purposes only and should not be considered a recommendation to take any action. You should discuss with a properly qualified financial professional prior to making any decisions. We take this information from sources we believe to be reliable but make no guarantee as to its accuracy. It is not possible to directly invest in an index.



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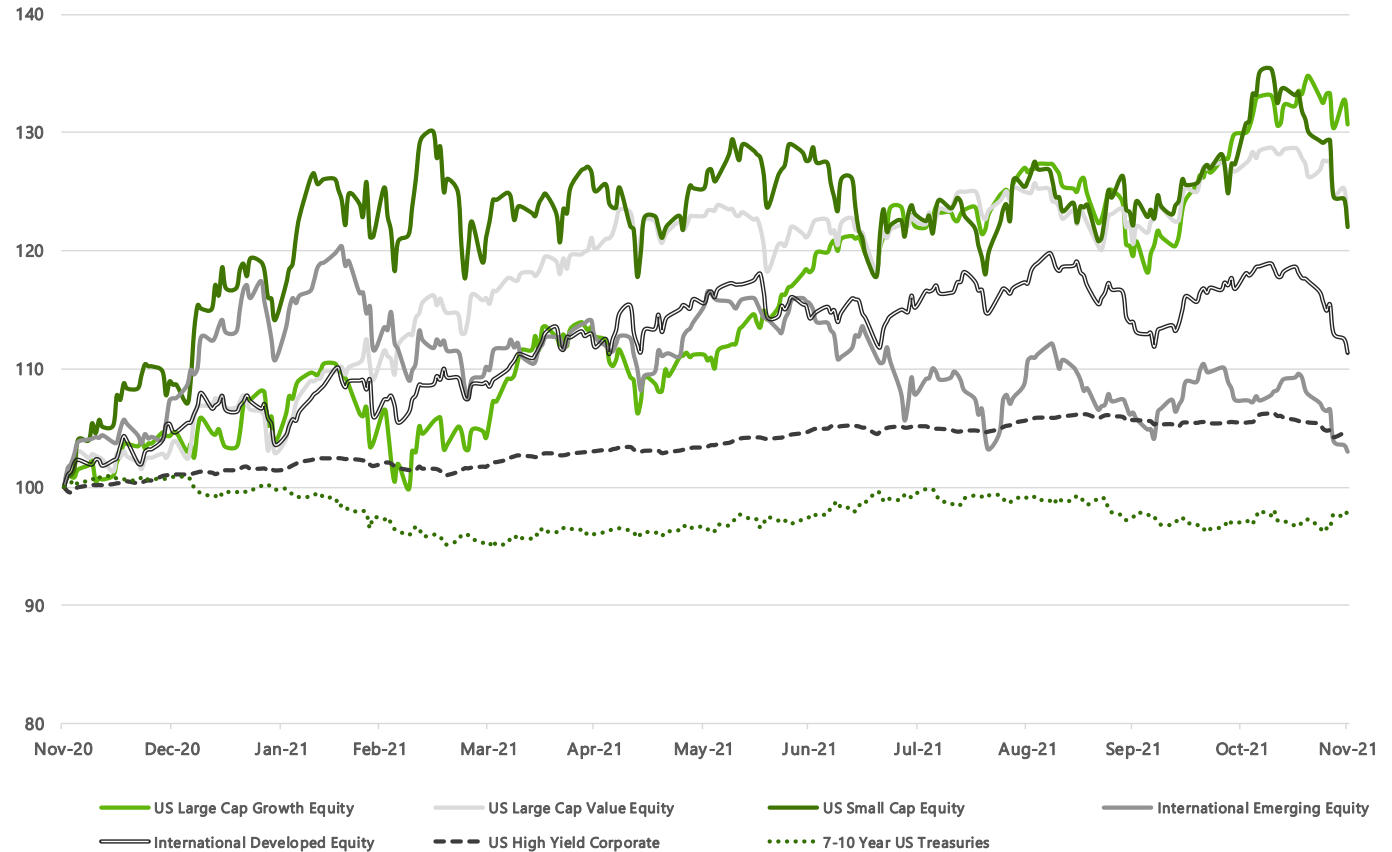
Equity Performance (Total Return)

Asset	1-Month	QTD	YTD
S&P 500	-0.70%	6.26%	23.17%
US Large Cap Growth Equity	0.61%	9.33%	24.95%
US Large Cap Value Equity	-3.53%	1.37%	17.71%
US Small Cap Equity	-4.19%	-0.11%	12.28%
International Emerging Equity	-4.07%	-3.12%	-4.21%
International Developed Equity	-4.63%	-2.28%	6.40%

Fixed Income Performance (Total Return)

Asset	1-Month	QTD	YTD
US Investment Grade Corporate	0.06%	0.31%	-0.96%
US High Yield Corporate	-0.97%	-1.14%	3.34%
1-3 Year US Treasuries	-0.04%	-0.37%	-0.39%
7-10 Year US Treasuries	1.09%	0.64%	-2.77%
20+ Year US Treasuries	2.85%	5.26%	-2.77%
US Municipal Bond	0.85%	0.56%	1.35%

Trailing 12-Month Performance



Source: Bloomberg, Wealthshield; As of 11/30/2021

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Asset Class	Proxy	Asset Class	Proxy
Large Cap Value	Russell 1000 Value TR USD	Large Cap Value Equity	S&P 500 Dividend Aristocrats TR USD
Large Cap Value Equity	Russell 1000 Dividend Select EW TR USD	Large Cap Growth	Pacer US Cash Cows Growth Index TR
Large Cap Growth Equity	Russell 1000 Growth TR USD	Momentum Equity	MSCI USA Momentum NR USD
Small Cap Equity	Russell 2000 TR USD	Managed Futures	SG Trend Index
International Developed Equity	MSCI EAFE NR USD	Dividend Growth Strategies	S&P 500 Dividend Aristocrats TR USD
Small Cap Dividend Growth	Russell 2000 Dividend Growth Select USD	Large Cap Dividend Growth	Russell 1000 Dividend Select EW TR USD
International Emerging Equity	MSCI EM NR USD	Quality	MSCI USA Sector Neutral Quality NR USD
Intermediate/Aggregate Bond	BBgBarc US Agg Bond TR USD	Commodities	Bloomberg Commodity TR USD
Municipal Bonds	S&P Municipal Bond TR USD	Private Equity	Cambridge Associates US Private Equity USD
International Bond	BBgBarc Gbl Agg Ex USD TR Hdg USD	Short Term Bond/Cash	BBgBarc US Aggregate 1-3 Yr TR USD
High Yield Bond	BbgBarc US Corporate High Yield TR USD	Long Term Treasuries	ICE U.S. Treasury 20+ Year Bond TR USD
Intermediate Treasuries	ICE U.S. Treasury 7-10 Year Bond TR USD	Short Term Treasuries	ICE U.S Treasury 1-3 Year Bond TR USD
Mid Cap Equity	Russell Mid Cap TR USD	Real Estate	NCREIF Indexes
International Equity	MSCI ACWI Ex US NR USD	US Equity	Russell 3000 TR USD
Global Equity	MSCI ACWI NR USD	Low Volatility Equity	S&P 500 Low Volatility TR USD
Global Alternatives	Hedge Fund Research HFRX Global Hedge Fund Index	Long Short Alternatives	Bloomberg Long/Short Hedge Fund Index
Merger Arbitrage	Hedge Fund Research Merger Arbitrage Index	Private Credit/Direct Lending	Cliffwater Direct Lending Index

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