



WEALTHSHIELD

FIVE FAST FACTS

APRIL 2022

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AMAZON AND APPLE COMMENTARY.

Earnings commentary offered pockets of disappointment during the month. Apple predicted that supply constraints due to China Covid restrictions would cost \$4 - \$8B in revenue during Q2. Amazon stated it was unprofitable during Q1.



ELON MUSK TO BUY TWITTER.

Billionaire entrepreneur Elon Musk agreed to buy Twitter for \$44B. Investors will receive \$54.20/share, a 38% premium to the stock's close on April 1st. Twitter currently trades at \$49.14/share.



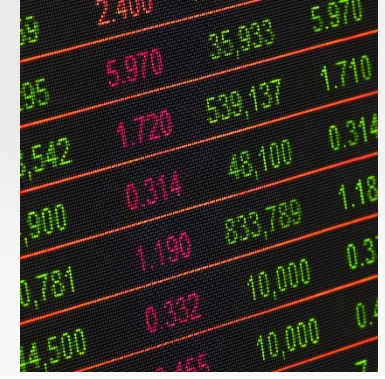
TESLA SELLOFF

Tesla shares erased roughly \$126B in value late in the month, following the approval of the Elon Musk Twitter acquisition. Investors were likely concerned of how he would fund the equity portion of the acquisition. In fact, Elon did sell \$4B of Tesla stock during the month.



CONSUMER PRICE INDEX ACCELERATES FURTHER YEAR OVER YEAR.

The Consumer Price Index (CPI) increased 8.5% YoY in March, the sharpest rise since the early 1980s. This follows a 7.9% YoY increase in February.



FED UPDATE.

Federal Reserve Chair Jerome Powell outlined his most aggressive approach yet to taming inflation, potentially endorsing 2+ half percentage-point interest-rate increases this year. Investors appeared to be pricing in half-point increases in May, June, and potentially July.

Sources: Bloomberg

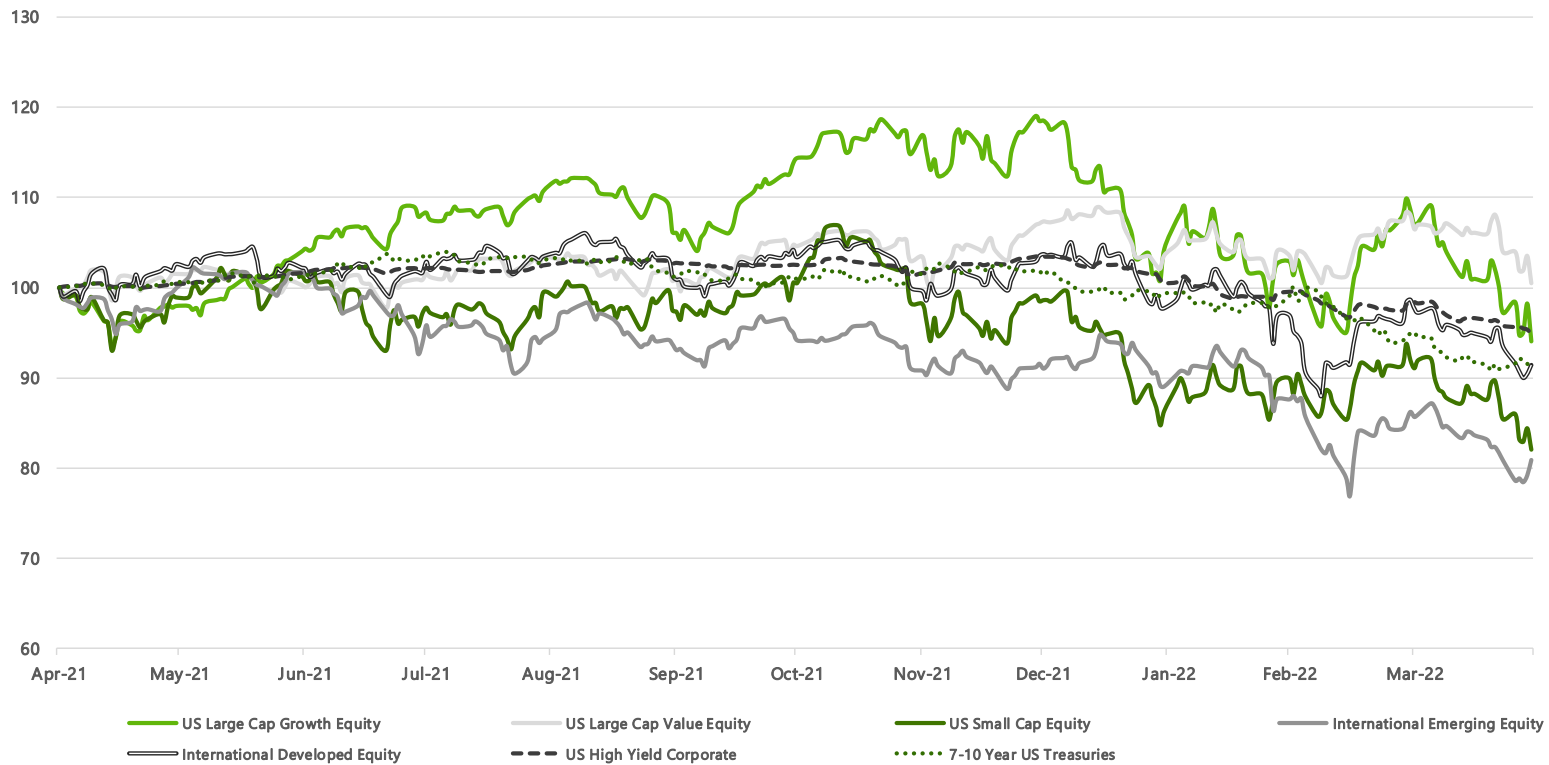
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Trailing 12-Month Performance



Source: Bloomberg, Wealthshield; As of 04/29/2022

Equity Performance (Total Return)

Asset	1-Month	QTD	YTD
S&P 500	-8.72%	-8.72%	-12.92%
US Large Cap Growth Equity	-12.08%	-12.08%	-20.03%
US Large Cap Value Equity	-5.64%	-5.64%	-6.34%
US Small Cap Equity	-9.91%	-9.91%	-16.70%
International Emerging Equity	-5.55%	-5.55%	-12.13%
International Developed Equity	-6.40%	-6.40%	-11.79%

Fixed Income Performance (Total Return)

Asset	1-Month	QTD	YTD
US Investment Grade Corporate	-5.47%	-5.47%	-12.73%
US High Yield Corporate	-3.56%	-3.56%	-8.22%
1-3 Year US Treasuries	-0.48%	-0.48%	-2.97%
7-10 Year US Treasuries	-4.18%	-4.18%	-10.52%
20+ Year US Treasuries	-9.42%	-9.42%	-19.40%
US Municipal Bond	-2.77%	-2.77%	-8.82%

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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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