



WEALTHSHIELD FIVE FAST FACTS

OCTOBER 2021

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WTI CRUDE OIL PRICE CLOSES ABOVE \$80/BBL.

WTI traded above \$85/bbl briefly in October, settling around \$83/bbl to close out the month. WTI Crude is up 140% YoY. The Brent-WTI spread is currently \$0.21/bbl, 79% lower than this time last year.

Sources: Bloomberg



RENAULT SA ANNOUNCES FURTHER CUTBACKS IN PRODUCTION.

Renault became the latest automaker to announce cutbacks due to the global chip shortage. The shortage has worsened and has even impacted the US tech sector, with Snap Inc. indicating advertising hesitancy as companies fear an inability to deliver products.



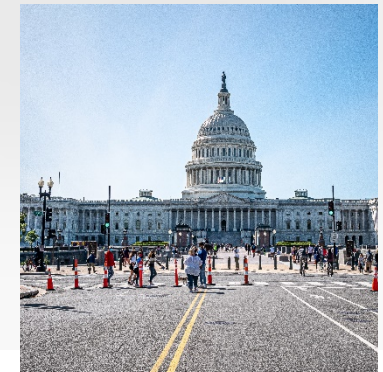
PRESIDENT JOE BIDEN WALKS BACK TAX INCREASES.

The president stated that he doesn't think there is an adequate amount of Democratic votes to push through tax increases. A White House official indicated the President was only referring to corporate taxes.



THE FIRST CRYPTO ETF LAUNCHES.

ProShares launched "BITO" in October. BITO tracks Bitcoin futures.



SENATE AGREES ON DEBT CEILING INCREASE.

A short-term increase to the debt ceiling was agreed upon during the month. The decision only moved the issue to December, meaning the drama may occur again soon.



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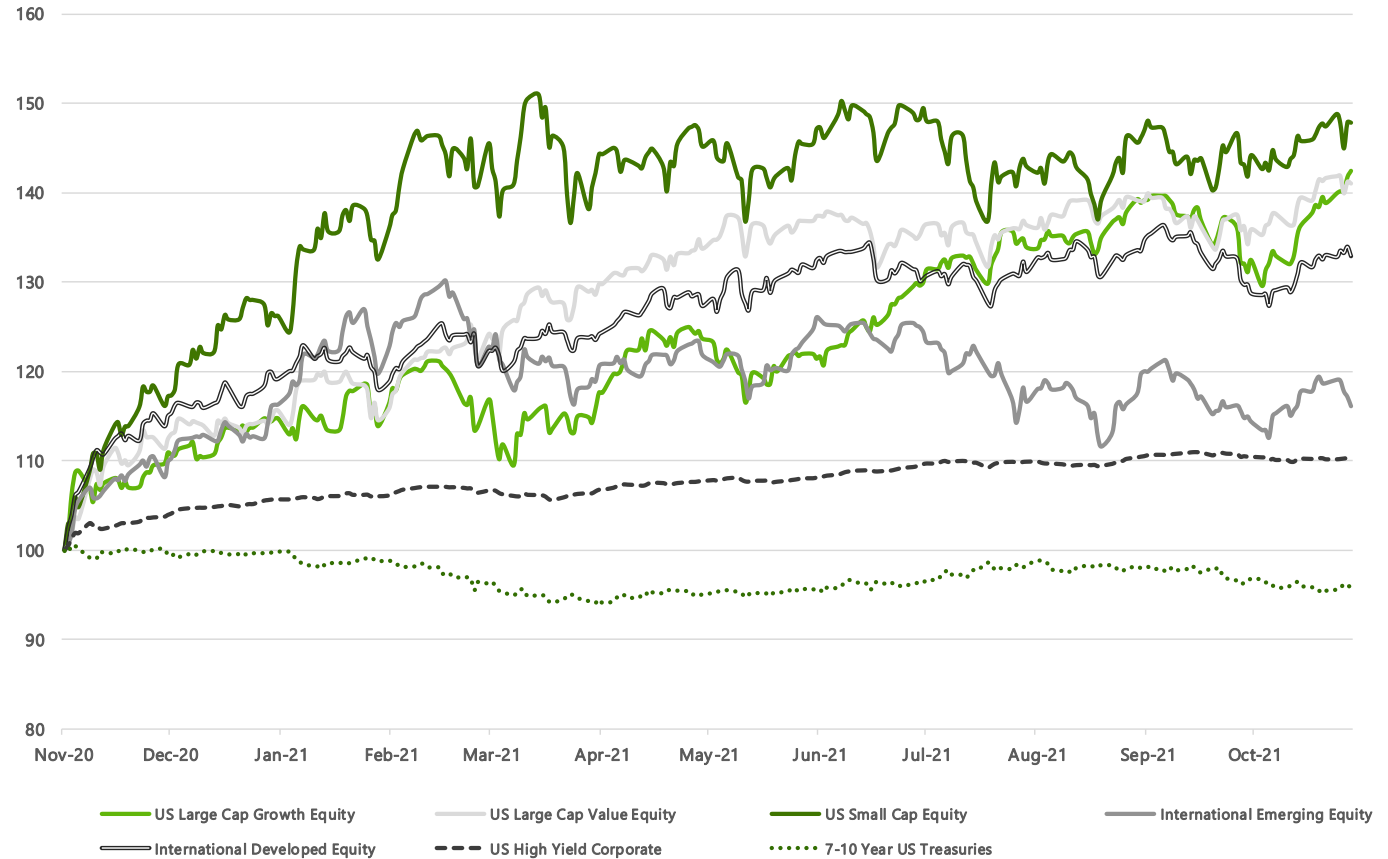
Equity Performance (Total Return)

Asset	1-Month	QTD	YTD
S&P 500	7.01%	7.01%	24.03%
US Large Cap Growth Equity	8.66%	8.66%	24.19%
US Large Cap Value Equity	5.08%	5.08%	22.01%
US Small Cap Equity	4.25%	4.25%	17.18%
International Emerging Equity	1.00%	1.00%	-0.14%
International Developed Equity	2.47%	2.47%	11.54%

Fixed Income Performance (Total Return)

Asset	1-Month	QTD	YTD
US Investment Grade Corporate	0.25%	0.25%	-1.02%
US High Yield Corporate	-0.17%	-0.17%	4.35%
1-3 Year US Treasuries	-0.32%	-0.32%	-0.35%
7-10 Year US Treasuries	-0.44%	-0.44%	-3.82%
20+ Year US Treasuries	2.34%	2.34%	-5.46%
US Municipal Bond	-0.29%	-0.29%	0.50%

Trailing 12-Month Performance



Source: Bloomberg, WealthShield; As of 10/31/2021

Sources: Bloomberg & WealthShield, As of Nov 2, 2021

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Historical data may use proxies to represent investments and asset classes. These proxies may have holdings and performance that vary from the investments or asset classes over time. Proxies include but are not limited to:

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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