



WEALTHSHIELD

FIVE FAST FACTS

June 2022

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FED RAISES INTEREST RATES 75 BASIS POINTS - BIGGEST INCREASE SINCE 1994

The Federal Reserve raised its benchmark interest rates 75 basis points in an effort to combat inflation. Jerome Powell also stated that he expected a 50 or 75 basis point increase in July as well.



BITCOIN POSTS WORST QUARTER IN OVER A DECADE

Bitcoin has lost around 58% in the second quarter of 2022. This marks the worst quarterly loss in over a decade. Bitcoin started the quarter at \$45,524 and traded just below \$19,000 on Thursday June 30th.



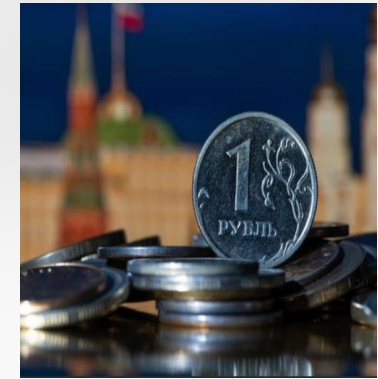
INFLATION HITS 40-YEAR HIGH OF 8.6%

Inflation is running rampant at an all time high of 8.6% this month. The last time inflation was this high was in December of 1981. The gasoline index has risen 4.1% and the food index is up 1.2%.



S&P 500 SUFFERS WORST FIRST HALF SINCE 1970

The S&P 500 has suffered its worst first half since 1970 when it lost 21%. The increasing worry of surging inflation, the fed interest rate hikes, the ongoing Russian Ukraine war, and continued Covid-19 lockdowns in China are all contributors to this recent drawdown.



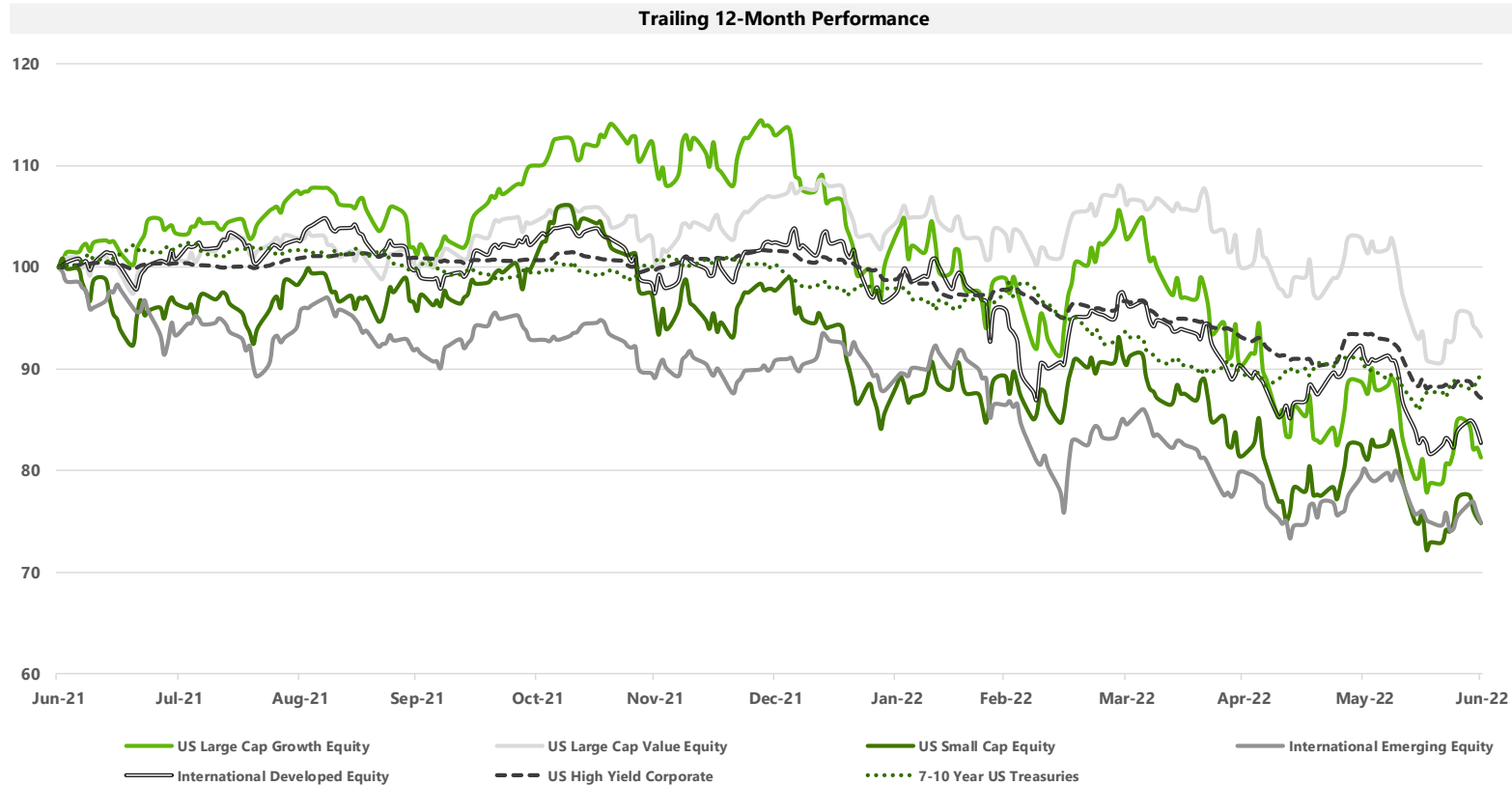
RUSSIA MISSES BOND DEADLINE- FIRST DEFAULT ON FOREIGN DEBT SINCE 1918

Interest payments totaling \$100 million were due on May 27th and subject to a grace period which expired June 27th. This is the first time that Russia has entered into a major foreign debt default in over a century. The Kremlin has rejected the claim that Russia is in default since the payments were blocked.



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Source: Bloomberg, Wealthshield; As of 06/30/2022

Equity Performance (Total Return)

Asset	1-Month	QTD	YTD
S&P 500	-8.26%	-16.11%	-19.97%
US Large Cap Growth Equity	-7.92%	-20.92%	-28.07%
US Large Cap Value Equity	-8.75%	-12.22%	-12.87%
US Small Cap Equity	-8.23%	-17.21%	-23.45%
International Emerging Equity	-6.63%	-11.40%	-17.57%
International Developed Equity	-9.26%	-14.32%	-19.23%

Fixed Income Performance (Total Return)

Asset	1-Month	QTD	YTD
US Investment Grade Corporate	-2.80%	-7.26%	-14.39%
US High Yield Corporate	-6.73%	-9.83%	-14.19%
1-3 Year US Treasuries	-0.64%	-0.52%	-3.01%
7-10 Year US Treasuries	-0.98%	-4.46%	-10.78%
20+ Year US Treasuries	-1.42%	-12.67%	-22.29%
US Municipal Bond	-1.64%	-2.94%	-8.98%

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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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