

Active markets require active portfolios

J.P. Morgan Tactical Model Portfolios

Building a strong portfolio is one part of investing. Keeping it strong is another.

With a tactical model portfolio from J.P. Morgan, a team of experts analyze markets to determine when to make adjustments, what to buy and sell, and how much to trade. Simply work with your financial professional to choose a portfolio and let us keep you on track through even the most challenging times.

What makes J.P. Morgan tactical portfolios unique



Active allocation

Not a static portfolio – when facts change, your investments do too



Active management

A diversified mix of managers with the potential to outperform

Tactical portfolios at a glance

- Globally diversified and precision-built to serve specific investors, ranging from conservative to aggressive
- Seeks to maximize return while managing risks
- Invests in mutual funds, ETFs or a blend of both
- Daily portfolio oversight with adjustments as new market opportunities and risks arise



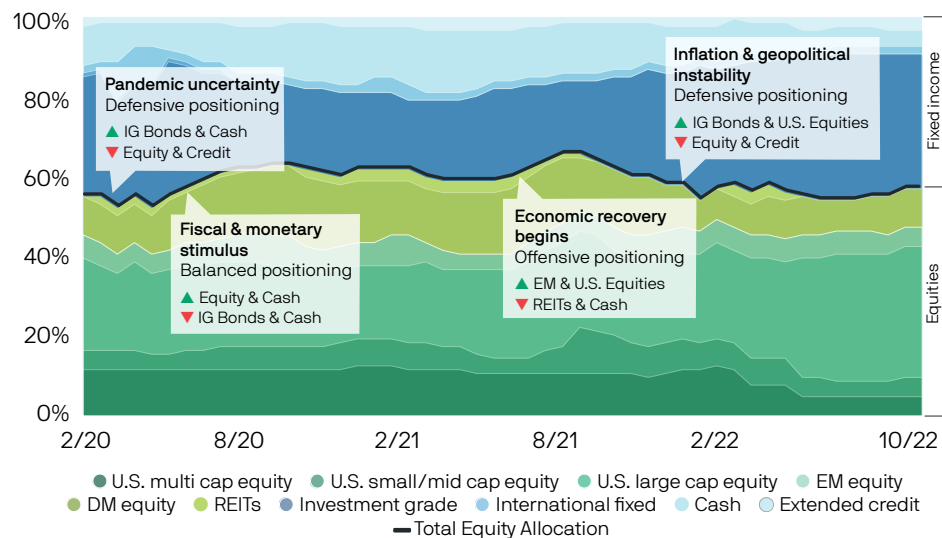
Active insights

Tools and resources for you and your financial professional

Active allocation allows you to play both offense and defense

Tactical allocation shifts allowed us to quickly adjust portfolios throughout a period of economic and market uncertainty.

Representative 60-40 Model



- ✓ Freedom to trade when the facts change – not limited by preset schedules
- ✓ Flexibility to shift portfolios +/- 10% versus benchmark*

Built to adapt to short-term market conditions to help you stay on course toward your long-term goals.

*Tactical ranges may vary by platform.

Chart source: JPMorgan Asset Management. Allocations as of 12/31/22. Allocations reflect a representative account and are shown for illustrative purposes only. Represents positioning for the Moderate model. Should not be considered a recommendation to buy or sell a particular security or asset class. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice.

A dedicated team of experts working for you

Tactical portfolios are managed by J.P. Morgan's Multi-Asset Solutions team, giving you access to experts from all around the world, all focused on delivering the strongest portfolio and best results.

Multi-Asset Solutions team¹



¹Source: J.P. Morgan Asset Management, as of 12/31/2022.

50+ years

Managing multi-asset portfolios

\$286+ billion

Assets under supervision

1 mission

Build portfolios that solve real-life investor needs

106+

Multi-asset experts with access to:

- 1,000+ investment professionals across 70+ global markets
- 600+ investment strategies
- Insights from a \$300 million annual research budget

Available through your financial professional

Please consult with your financial professional to learn more about J.P. Morgan's tactical portfolios and to choose the right one for your needs.

Stay informed and on track

J.P. Morgan will provide your advisor with continual portfolio updates and access to industry-leading tools and resources— you'll have everything you need to understand the progress toward achieving your goals.



Trade alerts



Market insights



Portfolio analytics

Disclaimer

This material is not an offer or solicitation for the purchase or sale of any financial instrument in any jurisdiction, nor is it a commitment by J.P. Morgan Asset Management or any of its subsidiaries (collectively "JPMAM") to enter into any transaction referenced herein. All information provided by JPMAM herein is indicative, is based on certain assumptions and current market conditions and is subject to change without notice. Accordingly, no reliance should be placed on the information herein. In deciding whether to enter into any transaction or strategy referenced herein, the recipient should rely solely on the final documentation which will contain the definitive terms and conditions relating to any referenced transaction or strategy.

These materials have been provided for illustrative purposes only and should not be relied upon by you in evaluating the merits of investing in any securities or strategies mentioned herein. Past performance is not a guide to the future. Any forecasts, opinions and statements of financial market trends expressed are JPMAM's own at the date of this document and may be subject to change without notice. Any research in this document has been obtained and may have been acted upon by JPMAM for its own purpose. The results of such research are being made available as additional information only and do not constitute investment advice. They do not reflect the views of JPMorgan Chase Group. The value of investments and the income from them may fluctuate in accordance with market conditions and taxation agreements and investors may not get back the full amount invested. Both past performance and yield may not be a reliable guide to current and future performance. Changes in exchange rates may have an adverse effect on the value, price or income of the product or underlying overseas investments. JPMAM makes no representation or warranty regarding the accuracy or completeness of the information herein. JPMAM is not an advisor

to any person who receives information on any referenced transaction.

The recipient must make an independent assessment of a legal, credit, tax, regulatory and accounting issues and determine with its own professional advisors any suitability or appropriateness implications of any transaction referenced herein in the context of its particular circumstances. JPMAM assumes no responsibility or liability whatsoever to any person in respect of such matters.

JPMAM, or any connected or associated person, may hold long or short positions or derivative interest in or act as market maker in the financial instruments of any issuer referred to herein or act as underwriter, distributor, advisor or lender to any such issuer. JPMAM may conduct trading activities, including hedging, in connection with any transaction referenced herein which may have an adverse impact on the recipient.

Telephone calls and electronic communications may be monitored and/or recorded. Personal data will be collected, stored and processed by J.P. Morgan Asset Management in accordance with our privacy policies at <https://www.jpmorgan.com/privacy>.

This material is meant to be distributed by Intermediaries where Advisory Portfolios are available.

J.P. Morgan Asset Management is the brand for the asset management business of JPMorgan Chase & Co. and its affiliates worldwide.

If you are a person with a disability and need additional support in viewing the material, please call us at 1-800-343-1113 for assistance.

Issued in the United States by J.P. Morgan Investment Management Inc.

© 2023 JPMorgan Chase & Co. All rights reserved.

BRO-MODELS-TACTICAL | 09sr232701155520