

# JPMorgan Tactical Model Portfolios

Globally diversified, actively managed model portfolios with the flexibility to capture short-term market opportunities

## Helping you navigate through even the most challenging times

Whether growing wealth or preserving capital, active management can keep you on track as market conditions change. JPMorgan Tactical Model Portfolios are designed to provide:

+	+	+
<b>Active allocation</b>	<b>Active investment selection</b>	<b>Diversification</b>
Not a static portfolio — we have flexibility to adjust to changing markets	Our experts can blend index funds with active managers with the potential to outperform	Designed to give you diversified exposure to markets using mutual funds and/or ETFs

## Active allocation allows you to play both offense and defense

The experts at J.P. Morgan adjust the model portfolio to adapt to changing markets.

- Extended Credit
- Cash/Ultra-Short Fixed Income
- Investment Grade Bonds
- International Developed Equities
- Emerging Markets Equities
- U.S. Equities
- Total Equity Allocation

### Case study: Examples of selected historical changes

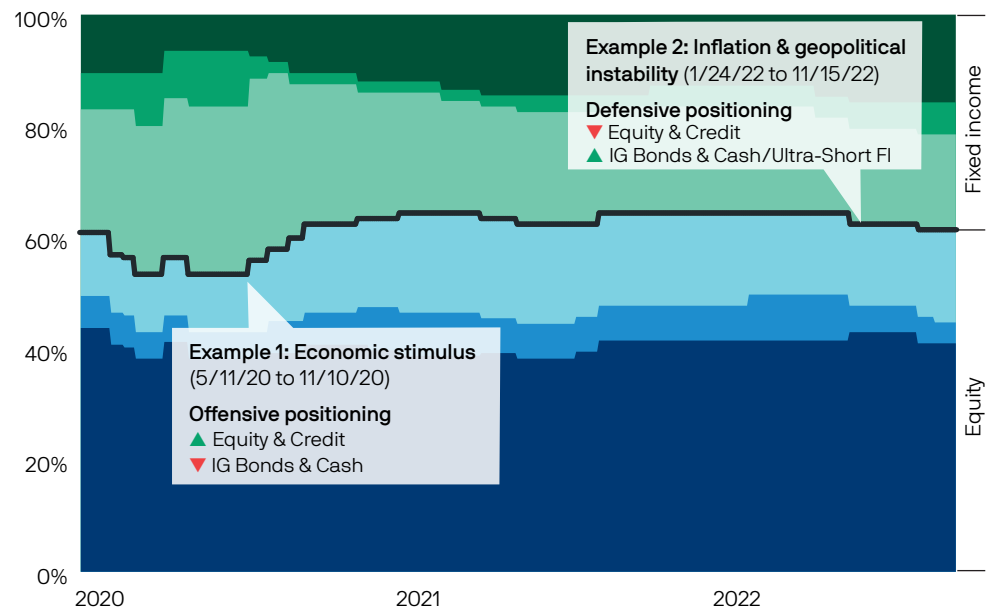


Chart source: J.P. Morgan Asset Management. Allocations between 1/1/20 - 12/31/22. Allocations reflect a representative account and are shown for illustrative purposes only. Represents positioning for the Moderate model. Should not be considered a recommendation to buy or sell a particular security or asset class. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice.

## A team of experts, working for you

Our model portfolios are managed by the J.P. Morgan Multi-Asset Solutions team, the same professionals serving some of the world's largest institutional investors.

- 100+** Multi-asset experts with access to the best investment ideas from nearly 1,300 professionals in 70+ global markets<sup>1</sup>
- 50+** Year investment track record across different market cycles<sup>1</sup>
- \$528B** Assets under supervision<sup>1</sup>

## Stay informed and on track

With J.P. Morgan, you and your financial professional get regular updates on your portfolio and its progress toward your goals.



Investment updates showing what you own and how it's performing



Trade alerts whenever your portfolio changes



Market insights into what's happening and what it means for you



Talk to your financial professional about your investment goals and how to achieve them with a J.P. Morgan Model Portfolio

<sup>1</sup>J.P. Morgan Asset Management, as of 12/31/25.

AUS includes both Multi-Asset Solutions and Beta assets. J.P. Morgan Asset Management (JPMAM) provides quantitative models to third party advisors who are responsible for the day to day discretionary management of client portfolios. These models are based on historical data and certain assumptions, which may not hold in all market conditions. As a model provider, JPMAM has no discretionary responsibility for the management of client portfolios.

### Risk Summary

Diversification does not guarantee investment returns and does not eliminate the risk of loss.

Investments in smaller companies may be riskier, less liquid, more volatile and more vulnerable to economic, market and industry changes than investments in larger, more established companies. Changes in the price of debt or equity issued by such companies may be more sudden or erratic than the prices of other securities, especially over the short term. International investing has a greater degree of risk and increased volatility due to political and economic instability of some overseas markets. Changes in currency exchange rates and different accounting and taxation policies outside the U.S. can affect returns.

Investments in bonds and other debt securities will change in value based on changes in interest rates. If rates rise, the value of these investments generally drops. Securities rated below investment grade are considered "high-yield," "noninvestment grade," "below investment grade" or "junk bonds." They generally are rated in the fifth or lower rating categories of Standard & Poor's and Moody's Investors Service. Although they can provide higher yields than higher rated securities, they can carry greater risk.

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

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