Custom Core seeks to combine the consistent performance and diversification of index-based ETFs and mutual funds with the benefits of a customized SMA

Continue the Custom Core Journey

WHY CUSTOM CORE

Elevate wealth management discussions with truly personalized investment portfolios

Compare the benefits of an SMA vs. an ETF (/File/DownloadContent?filename=Parametric Tax Managed SMAs are Better 2017.CA.pdf)

Learn ways to help unlock the value of an SMA (/File/DownloadContent?filename=Building Better Beta.CA.pdf)

Is your manager measuring up? (/File/DownloadConten filename=Is Your Alpha Big Enough To Cover It Taxes Revisited.pdf)

WHY PARAMETRIC

Partner with an industry leader to leverage Custom Core and solve for unique

investment needs

Access Tools to Enhance Meetings

Run Transition Analysis To Set Clear Expectations

Share Quarterly Reporting And Data To Allow For Transparency

Find out how Paran
aligns portfolios v
client values

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See how tracking e
management can
deliver consiste
performance & tax
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Tracking Error.CA.

Learn how Parametric
approaches tax
management

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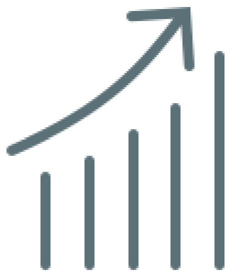
Approach to Tax
Management
2016.CA.pdf)

Parametric does not offer tax advice. Please consult with your tax professional regarding your specific circumstances.

WHAT WE DELIVER

Tax affects performance, so we pay close attention



1%-2%

Our solutions seek 1% to 2% in annual after-tax excess returns

25 years

of tax-management experience

Explore how market conditions impact tax management (/File/DownloadContent?filename=Estimating Tax Alpha in Different Market Environments.CA.pdf)

Learn how Parametric calculates after-tax returns (/File/DownloadContent?filename=Parametric After-Tax Returns Methodology for

Discover how advisors put Custom Core to work (/File/DownloadConten filename=Parametric Custom Core Case Studies 2016.pdf)

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2015.CA.pdf)

Investing entails risks, and there can be no assurance that Parametric will achieve profits or avoid incurring losses. All investments are subject to potential loss of principal.

Explore Our Advisor Tools

These advisor tools can be accessed by the general public but are intended to be used by investment professionals and financial advisors only. Understanding these tools requires a level of investments knowledge and experience. The information on this website is not an offer to sell or a solicitation of an offer to buy any security, nor shall any such security be offered or sold to any person without the assistance of their financial advisor. These tools do not provide, and may not be relied upon, for investment, accounting, legal, or tax advice. They are designed for informational and educational purposes only.

Benchmark Builder (/Tools/BenchmarkBuilder)

Assess the characteristics and performance of a customized benchmark against a comparison index

ESG Screen Analyzer (/Tools/ScreenAnalyzer)

Explore the potential impact of eliminating sectors, industries and ESG screens from a benchmark

Transition Analysis Explorer

Evaluate multiple risk and tax impact scenarios before funding portfolios with securities

Portfolio Lab

Combine and assess benchmark blends, ESG screens and transitions

SIMULATION TOOLS

Tax Alpha Simulator

Compare how the loss harvesting experience of a portfolio is impacted by market conditions

Custody Fee Calculator

Compare the differences between asset-based pricing and transaction-based pricing for your portfolio

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