

# S&P Dow Jones Indices

A Division of **S&P Global**

## S&P MARC 5% Index

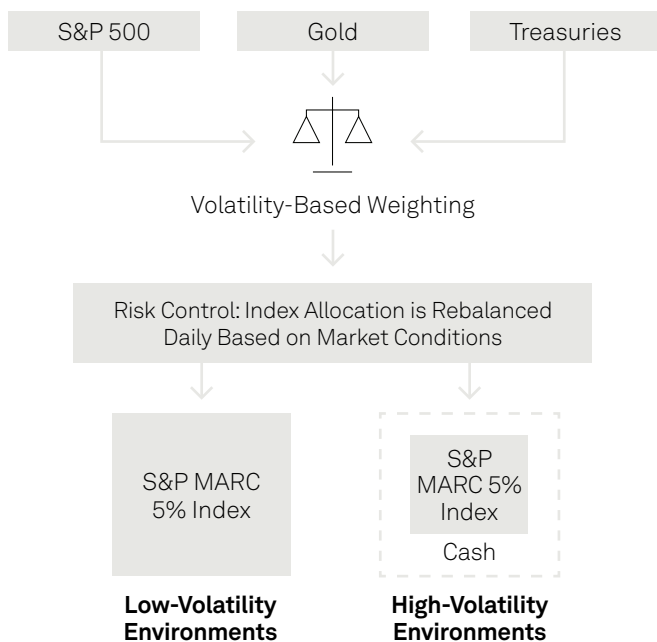
### A Dynamic Multi-Asset Strategy

Global capital markets are constantly fluctuating, so it's crucial to mitigate the impact of unexpected dips. S&P Dow Jones Indices, the leading provider of market indices for use in insurance products, has created a diversified multi-asset index that uses an innovative design to manage market volatility.

The S&P MARC 5% (Multi-Asset Risk Control) Index seeks to provide **multi-asset diversification** within a simple risk weighting framework, tracking three underlying component indices that represent:

- Equities: S&P 500®
- Commodities: S&P GSCI Gold
- Fixed Income: S&P 10-Year U.S. Treasury Note Futures

#### How Does the S&P MARC 5% Index Work?



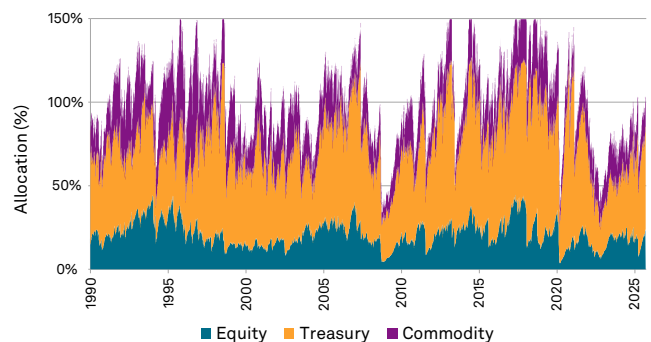
In low-volatility environments, the S&P MARC 5% Index risk control mechanism increases market exposure to riskier assets by increasing the allocation to the index (up to a leveraged position of 150%).

#### Multi-Asset Benefits

- Volatility Reduction
- Diversification
- Inflation Protection
- Rising Rate Protection
- Downside Protection

#### Back-Tested Daily Asset Mix of the S&P MARC 5% Index

The strategy is **rebalanced daily** to maintain a target volatility of 5% through a dynamic allocation to cash.



Source: S&P Dow Jones Indices LLC. Data as of Dec. 31, 2025. Index performance based on excess returns in USD. Past performance is no guarantee of future results. Chart is provided for illustrative purposes and reflects hypothetical historical performance. The S&P MARC 5% Index was launched March 27, 2017.

## About S&P Dow Jones Indices

At S&P Dow Jones Indices, we provide iconic and innovative index solutions backed by unparalleled expertise across the asset-class spectrum. By bringing transparency to the global capital markets, we empower investors everywhere to make decisions with conviction. We're the largest global resource for index-based concepts, data and research, and home to iconic financial market indicators, such as the S&P 500® and the Dow Jones Industrial Average®. More assets are invested in products based upon our indices than any other index provider in the world. Our solutions are widely considered essential in tracking market performance, evaluating portfolios and developing investment strategies.

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