

Upcoming Chapter Meeting: AAII Birmingham



Date: Thursday, November 7, 2013

Topic: Lessons Learned from Harvard and Yale Endowments: Using Managed Futures for Portfolio Diversification

Speaker: David Johnson, President and Portfolio Manager, Global Capital Group

Numerous studies show that adding diversified, non-correlated alternative investments to portfolios has not only increased returns beyond traditional portfolios but has done so with significantly less risk. David Johnson will show mounting evidence of a coming tough environment for traditional investments over the next decade and how to select portfolio components that have the potential to increase returns and reduce risk in this environment. Stocks, bonds, managed futures, and real estate all have their places in a robust portfolio for the next decade. The key is learning what each has to offer and how to use them together effectively in this challenging investing environment.

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