

R E T I R E M E N T



February 15, 2017 - [Maxwell Freccia](#), [Matthew Rauseo](#), [Daniel Villalon](#)

In part two of this two-part series, we focus on the implementation of a defensive equity strategy within the context of a DC retirement plan.

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June 1, 2016 - [Daniel Villalon](#), Liza Truax, Megan Mones

In part one of this two-part series, we focus on the intuition behind defensive equity and present evidence for its efficacy as part of an effective defined contribution retirement plan.

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January 27, 2016 - Robert Capone, [Adam Akant](#)

We focus on the need for target-date funds to better protect against losses during equity market drawdowns and to better diversify. We suggest incorporating trend following as a potential solution, which may mitigate the problems caused by equity risk concentration.

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September 18, 2015 - Robert Capone, Liza Truax

Target-date funds have become popular defined contribution investing vehicle. We believe, however, several shortcomings should be addressed to more reliably maximize retirement outcomes and we suggest incorporating real assets.

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Target-date funds (TDF) have a few shortcomings, but we believe that implementing risk parity as a sleeve within a TDF can help—by potentially enhancing returns, mitigating risk and reducing portfolio drawdowns.

