EQUITIES

IS YOUR PORTFOLIO READY FOR THE NEXT ECONOMIC CYCLE?

In today's environment, it's more important than ever to be active in managing equity strategies. Our multi-step factor analysis can give you a deeper understanding of your portfolio's risk/return profile and how it's positioned for various environments.

STEP 1: INTRO TO EQUITY FACTOR ANALYSIS

We'll give you an overview of our multi-factor regression analysis. By analyzing historical performance trends and relationships as well as positioning across funds, this tool can assess your portfolio's exposure to various risk/return factors and the implications based on different macro environments.

STEP 2: ANALYZING THE PORTFOLIO

Using AB's Factor Analysis to analyze a client's holdings, we seek to uncover potential hidden risks within the portfolio—and identify ways to better position it to align with the client's objectives.

The analysis focuses on the following aspects:

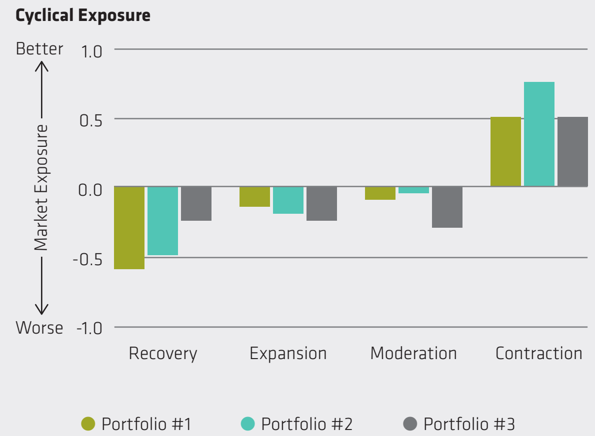
+ **Portfolio Factor Exposures:** the sensitivity of the overall portfolio to various risk/return factors, such as growth, quality or defensive value
+ **Stock and Sector Exposures:** in aggregate, what are the existing sector and stock exposures and how are they likely to influence returns?
+ **Overall Characteristics:** correlations to key macro variables, a capital-gains profile and positioning for different stages of the economic cycle, such as recovery, expansion, moderation and contraction (see display)

STEP 3: REVIEW AB'S ANALYSIS

Schedule a meeting with one of AB's Senior Portfolio Managers to do a deep dive on your equity portfolio. We can run additional scenarios to help you better understand how your equity portfolio's profile can change to better reflect your views.

Our experienced team has conducted hundreds of meetings and can help ensure that advisors are confident and comfortable with their clients' portfolios.

HOW IS YOUR PORTFOLIO POSITIONED FOR THE ECONOMIC CYCLE?



For illustrative purposes only.
Source: AB

AB EQUITIES: DIVERSE TEAMS DRIVEN BY HIGH-CONVICTION ACTIVE STRATEGIES

+ **Differentiated research** is at the core of each strategy to deliver solutions and results for our clients
+ **An active approach** that differs from the benchmark to increase the probability of our clients' success
+ **Disciplined investment process** with proven track record in meeting clients' risk and return objectives

GLOBAL PLATFORM. LOCAL PERSPECTIVES.

$117 BIL
Assets Under Management

132
Investment Professionals

19
Average Years of Investment Experience

As of September 30, 2017

LEARN MORE

FOR MORE INFORMATION ON HOW OUR FACTOR ANALYSIS CAN HELP YOU BETTER POSITION YOUR CLIENTS' PORTFOLIOS, PLEASE CONTACT YOUR AB REPRESENTATIVE AT (800) 247 4154.

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