



HiddenLevers uses economic research, historical records, statistical data, and quantitative analysis to measure millions of relationships between the economy and investments.

# What is Portfolio Stress Testing?

	Holdings	Recommendation
 Public Health De-Politicized 	+11.6%	+23.4%
 Economy > Body Count 	-9.7%	-13.6%
 Second Wave 	-16.9%	-31.6%

Stress Testing is about assessing the potential impact of economic scenarios (e.g. oil crash, inflation, etc.) on your portfolio and other investments. In a portfolio stress test, we construct “what-if” scenarios based on real life macro-economic uncertainties, and measure their potential impact on your portfolio.

Portfolio stress testing is not about predicting the future, but about identifying and adjusting for downside risks.

# Key Elements

of the HiddenLevers Portfolio Stress Test



## Find the Connections

HiddenLevers uses big data to measure millions of relationships between the economy and investments. Interest rates affect home sales and oil prices, which impact the price of Home Depot stock. We uncover these links for 35,000+ investments.

## Ask the Big What-ifs

HiddenLevers' research team creates scenarios to model recessions, crises, and other economic events, using historical research and analysis on how economic indicators are correlated.

## Model the Impacts

In a stress test, investment performance is projected using the relationships measured in step 1, applied to the scenario assumptions in step 2. If a scenario forecasts oil to rise, and Exxon is correlated with oil, then Exxon will rise in that scenario.

# Measure Risks

and Opportunities Based on Real Data

We can apply a quantitative approach to test economic and market scenarios that may help you make more prudent investment and financial decisions.



## Living In Retirement

Do I have enough money to live comfortably in retirement?



## Paying For College

How should I get started and how much do I need to save?



## Maximizing Inheritance

What are the options available to make the most out of an inheritance?



## Preparing To Retire

Looking to retire in the next 5 to 10 years?

# Uncover The Risk

Hidden In Your Portfolio

Assess your portfolio risks against a variety of economic and market scenario outcomes, covering a range of possible events. We have identified nearly 90 different scenarios or we can build a scenario based on your forecast.



Election Chaos



NASDAQ Moonshots



Real Estate Post-COVID



2020 Recession



Baseline



Boomers Retire



Rising Interest Rates



Past Inflation



China Reckoning



Climate Disasters



COVID 2.0



US Coastal Exodus



Debt Cliff



S&P Valuation



Past Crashes



End of Retail



Europe Falls Behind



Fed Stress Test



Fed Underwrites Economy



Future of Energy



Trade War