

BlackRock and Julex Capital: The Core and Explore Approach



Parties tend to be more impressive when you invite various guests who create a more enjoyable and memorable experience when brought together. Like throwing a party, investment portfolios have the potential to be even more rewarding when you pair strategists who work to complement each other. Brand strategists help instill client confidence with their solid reputations and time-tested strategies. In contrast, emerging strategists can open the door to new opportunities with their unique strategies and insights.

This month BlackRock expanded its presence in Communities with 11 new portfolio families, delivering over 50 new strategies to the platform. Julex Capital, an emerging strategist, focused on tactical asset allocation and quantitative investing, also came aboard Orion's robust model marketplace. When these brand and emerging strategists come together, you bring a solid core to your models while leaving room to explore and add a little spice too.

Introducing The Core and Explore Approach

Brand Strategist: BlackRock "The Stable Core"

- Models deliver a more passive, broad-based, well-diversified, low cost, global exposure for your portfolio.
- The target allocation portfolios can serve as a good foundation or starting point when combining strategies.
- Pairs well with active and emerging managers, while BlackRock continues to provide more Beta exposure by staying optimized and focused on long-term trends.
- Multiple variations exist to suit client needs, including standard, tax-

aware, ESG, and multi-manager.

Emerging Strategist: Julex “A More Active Explorer”

- An active manager positioned to make more significant allocation changes based on market conditions.
- More tactical dynamic models, shifting between conservative and risky assets based on signals.
- A great complement to the more passive and broadly diversified BlackRock models.
- An emerging manager, exploratory, and able to add a bit of spice to the more traditional asset allocation model.

Learn more about BlackRock and Julex Capital! Click below to watch our recent on-demand webinars with each!

[BlackRock for Communities](#)

[Julex Capital for Communities](#)

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