ALTEXCHANGE

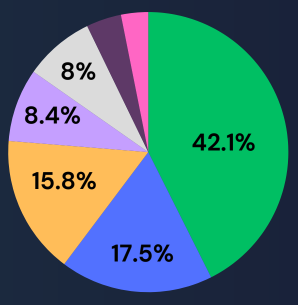
High-Net-Worth Alternative Investment Asset Allocation Report

Q1 2024

This report provides a detailed breakdown of asset allocation within alternative investment portfolios of high-net-worth individuals.

2024 Q1 HNW ASSET ALLOCATION

*Source: AltExchange



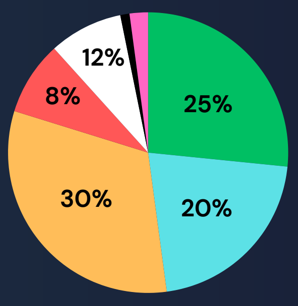
- Real Estate Funds
- Venture/Startups
- Private Equity
- Real Assets
- Private Credit
- Secondary Funds
- Hedge Funds

42.1%

The highest percentage on Real Estate Funds

2023 (Q4 2022-Q3 2023) UHNW ASSET ALLOCATION

*Source: Tiger 21



- Private Equity
- Real Estate Funds
- Public Equities
- Fixed Income
- Cash
- Hedge Funds
- Commodities

30%

The highest percentage on Private Equity Funds

HIGH-NET-WORTH INVESTORS:

1M+ IN LIQUID ASSETS

ULTRA-HIGH-NET-WORTH INVESTORS:

30M+ IN LIQUID ASSETS

TOP ALTERNATIVE ASSET CLASSES TO FOCUS ON IN 2024

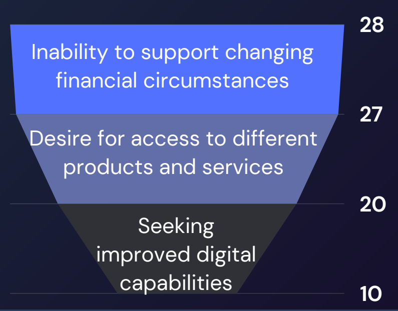
1. Real Estate Funds
2. Private Equity
3. Venture/Startups

PERCENTAGE OF TOTAL INVESTMENT PORTFOLIO ALLOCATED TO ALTERNATIVES

UHNW Investors	HNW Investors
50%+	31%

WHY HNW INVESTORS SWITCH ADVISORS

*Source: PWC

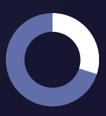


WHAT HNW INVESTORS ARE LOOKING FOR IN A FINANCIAL ADVISOR:

*Source: PWC

47% Tax Planning

66% Increased Personalization



46% Trust & Estate Planning

ALTEXCHANGE INSIGHTS:

"Given our high-net-worth investor data, we recommend financial advisors focus on providing holistic wealth management that incorporate alternative investments as a key part of service offerings. In addition, we recommend expanding curated, personalized experiences such as enhanced tax planning, trust & estate, planning, improved digital capabilities, access to unique opportunities, and the ability to adapt and change to client circumstances to retain clients and capture additional wealth."

Zak Boca, CEO AltExchange

To learn how you can use technology to effortlessly automate alternative investment management and reporting, please get in touch at hello@altexchange.com.

www.altexchange.com