

CLIENT RELATIONSHIP SUMMARY
MARCH 29, 2022
GLOVISTA INVESTMENTS LLC

Our advisory services are offered to you on a **discretionary basis**, meaning that you provide us with the ability to buy and sell investment in your account without asking you in advance. You may place limits on our discretionary authority. For example, you may limit the types of securities that we may invest in without your approval.

Glovista provides continuous and ongoing discretionary investment advisory services to retail clients. As part of those services, we review your portfolio, investment strategy, and investments. We also assess your financial situation and provide advice to meet your goals. We also provide customized advisory services designed to meet your specific investment needs. In addition, we offer two distinct strategies:

- Our “Global Tactical Asset Allocation” strategy (“GTAA Strategy”); and
- Our “Emerging Market Equities strategy (“Emerging Markets Strategy”).

Our GTAA Strategy is a global multi-asset strategy with no bias towards a particular asset class or geography. The strategy emphasizes capital protection during times of market uncertainty by raising cash. During times of lower macro and financial market volatility, the strategy invests in risk assets so as to generate returns in a risk-efficient manner.

Our Emerging Markets Strategy is intended for investors who seek to gain exposure to Emerging Market Equities on a long only basis. The focus of the strategy is on country, sector and currency allocations as opposed to bottom –up company analysis. The Emerging Markets Strategy invests in liquid markets and liquid US-listed securities. Since this strategy is always fully allocated to EM equities, it should form a part of the growth investment portfolio.