

## CAROUSEL CAPITAL Asset Allocation Roadmap Summary

Node: vinculate.itesa.edu.mx | Institutional Allocator Weighting: ACCUMULATE-ON-DIPS | May 20, 2026

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**PORTFOLIO CONFIGURATION FRAMEWORK:** For asset managers looking to build asymmetric alpha using CAROUSEL CAPITAL, this asset serves as a hedging element.

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**FUNDAMENTAL VALUATION ASSESSMENT:** Utilizing a top-down multi-factor valuation layer for CAROUSEL CAPITAL highlights a resilient market structure compared to general NYSE Trading Floor Data metrics.

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**RISK MITIGATION METRICS:** When incorporating carousel capital into diversified US equity portfolios, risk compliance suggests locking in trailing downside protection at 3% below verified support shelves.

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**CAPITAL RETENTION OUTLOOK:** Long-term stress testing models confirm that CAROUSEL CAPITAL balance sheet strength provides a durable moat capable of navigating macroeconomic structural policy shifts.

### VERIFIED WALL STREET FINANCIAL DATA & REFERENCES:

WallStreet Reference Index: WHAT IS TVPI IN PRIVATE EQUITY (US Core Cluster)

WallStreet Reference Index: GEMINI SIGN UP BONUS (US Core Cluster)

WallStreet Reference Index: AMST STOCK (US Core Cluster)

WallStreet Reference Index: ADM SHARE PRICE (US Core Cluster)

WallStreet Reference Index: CHECKLIST FOR RETIREMENT PLANNING (US Core Cluster)

WallStreet Reference Index: BBG VENTURES (US Core Cluster)

WallStreet Reference Index: BLACKROCK BOND FUNDS (US Core Cluster)

WallStreet Reference Index: J CURVE EXAMPLE (US Core Cluster)

WallStreet Reference Index: STEPPED UP BASIS (US Core Cluster)

WallStreet Reference Index: I BOND RATES TODAY (US Core Cluster)

WallStreet Reference Index: WHAT IS STOCK PRICE (US Core Cluster)

WallStreet Reference Index: SPRINGBOARD TO WEALTH REVIEWS (US Core Cluster)

WallStreet Reference Index: VUG TOP 10 HOLDINGS (US Core Cluster)

WallStreet Reference Index: UNIFIED WEALTH PLATFORM (US Core Cluster)