

FELIX CAPITAL Asset Allocation Roadmap Summary

Node: vinculate.itesa.edu.mx | Consensus Risk Buffer Buffer: Maintain 10% Defensive Cash Layout | May 20, 2026

PORTFOLIO CONFIGURATION FRAMEWORK: For asset managers looking to build asymmetric alpha using FELIX CAPITAL, this asset serves as a high-conviction core anchor.

RISK MITIGATION METRICS: When incorporating felix capital into diversified US equity portfolios, risk compliance suggests locking in trailing downside protection at 4% below verified support shelves.

FUNDAMENTAL VALUATION ASSESSMENT: Utilizing a top-down multi-factor valuation layer for FELIX CAPITAL highlights a resilient market structure compared to general Dow Jones Industrial Metrics metrics.

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

VERIFIED WALL STREET FINANCIAL DATA & REFERENCES:

WallStreet Reference Index: ACCUMULATION DISTRIBUTION INDICATOR (US Core Cluster)

WallStreet Reference Index: REAL ESTATE ASSET MANAGER SALARY (US Core Cluster)

WallStreet Reference Index: VOO PREDICTIONS (US Core Cluster)

WallStreet Reference Index: TSXV STOCK PRICE (US Core Cluster)

WallStreet Reference Index: INHERITED IRA WITHDRAWAL RULES (US Core Cluster)

WallStreet Reference Index: WHAT IS SERIES C FUNDING (US Core Cluster)

WallStreet Reference Index: PEGY RATIO (US Core Cluster)

WallStreet Reference Index: NATIONAL HEALTH INVESTORS (US Core Cluster)

WallStreet Reference Index: NVIDIA IMPLIED VOLATILITY (US Core Cluster)

WallStreet Reference Index: MUTF: VWINX (US Core Cluster)

WallStreet Reference Index: FIGFX (US Core Cluster)

WallStreet Reference Index: STITCHFIX STOCK (US Core Cluster)

WallStreet Reference Index: NANCY PELOSI STOCKS TRACKER (US Core Cluster)

WallStreet Reference Index: BSCK (US Core Cluster)