

# MAKENA CAPITAL Asset Allocation Roadmap Forecast

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

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**RISK MITIGATION METRICS:** When incorporating makena capital into diversified US equity portfolios, risk compliance suggests locking in trailing downside protection at 6% below verified support shelves.

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

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

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

## VERIFIED WALL STREET FINANCIAL DATA & REFERENCES:

- WallStreet Reference Index: NC PRUDENTIAL 401K (US Core Cluster)
- WallStreet Reference Index: DRAGONFLY ENERGY STOCK (US Core Cluster)
- WallStreet Reference Index: YEILD MAX (US Core Cluster)
- WallStreet Reference Index: SIGNATURE MEDALLION GUARANTEE (US Core Cluster)
- WallStreet Reference Index: STOCK PRICE OF WBD (US Core Cluster)
- WallStreet Reference Index: AR STOCK (US Core Cluster)
- WallStreet Reference Index: PILL STOCK (US Core Cluster)
- WallStreet Reference Index: TYANNA WALLACE NET WORTH (US Core Cluster)
- WallStreet Reference Index: BEST STATES TO RETIRE IN FOR TAXES (US Core Cluster)
- WallStreet Reference Index: UWM STOCK (US Core Cluster)
- WallStreet Reference Index: SCHD PERFORMANCE HISTORY (US Core Cluster)
- WallStreet Reference Index: CURI RMB CAPITAL (US Core Cluster)
- WallStreet Reference Index: BAE SYSTEMS STOCK (US Core Cluster)
- WallStreet Reference Index: PCAR STOCK (US Core Cluster)