

Siegel-WisdomTree Model Portfolios: Driving Advisor Success in a Dynamic Market

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Key Takeaways

- The Siegel-WisdomTree Model Portfolios empower advisors to balance efficiency and client engagement, enabling scalability without compromising personalized advice.
- By focusing on quality, valuations and dividend-paying stocks, the Portfolios demonstrated robust defense and recovery during market turbulence, exemplifying their reliability in navigating challenging environments.
- With an emphasis on equities, value and yield-enhancing strategies, the Portfolios reflect Professor Siegel's forward-looking insights, helping advisors stay ahead in a dynamic market landscape.

Advisors juggle two conflicting priorities—providing personalized advice and managing the countless moving parts of their practice. The reality is that you can't do everything well without the right tools.

That's why model portfolios matter.

They take the heavy lifting of portfolio construction off your plate so you can focus on what you do best: building trust, creating plans and being the steady hand your clients count on. Whether you're testing the waters with models or fully integrated into them, their beauty lies in striking the perfect balance between efficiency and engagement, allowing you to scale without sacrificing quality.

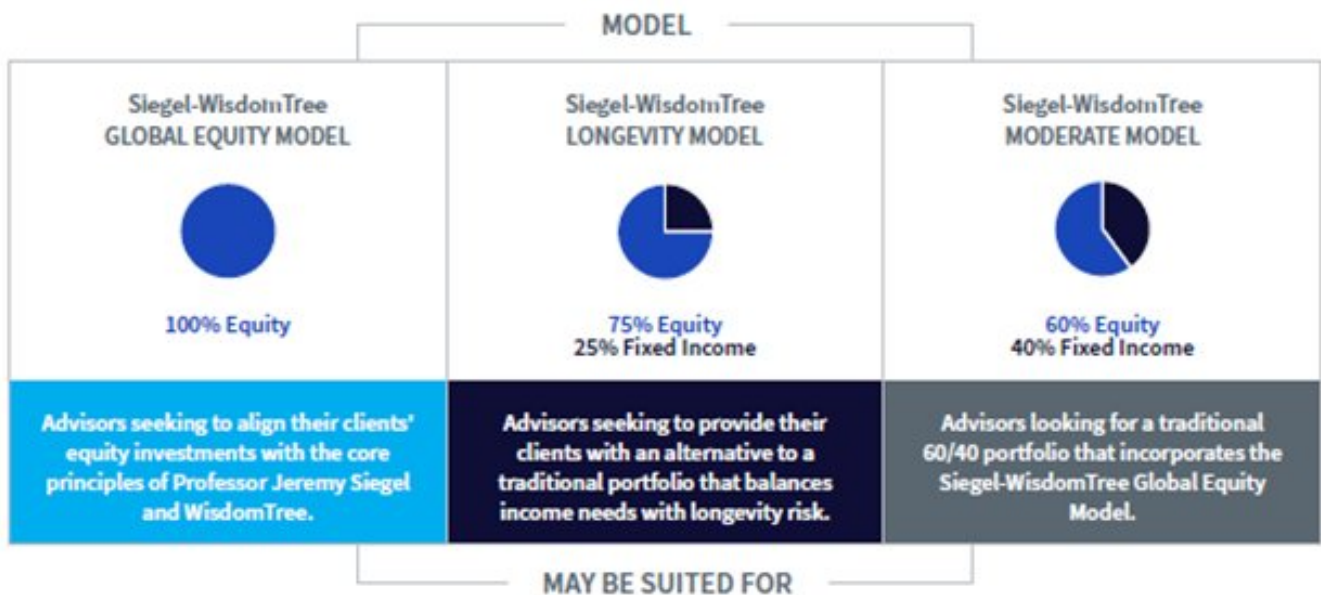
A First-of-Its-Kind Collaboration with Professor Jeremy Siegel

At WisdomTree, we're proud to collaborate with Professor Jeremy Siegel, an industry icon and author of *Stocks for the Long Run*. Together, we've developed the Siegel-WisdomTree Model Portfolios to help guide investors through complex market environments. Key principles that drive this long-term investing approach include:

1. **Quality and Valuations Always Matter:** Long-term investors should focus on earnings and profitability, while remembering that the price paid for an investment will be a primary factor in its future returns.
2. **Dividends for Defense and Recovery:** Dividend-paying stocks can potentially help protect investors in bear markets and enhance returns during rebounds.
3. **Addressing Longevity Risk:** With longer life expectancies extending investment horizons, a greater allocation to global equities may be warranted.

Three Risk Profiles for Versatile Investment Needs

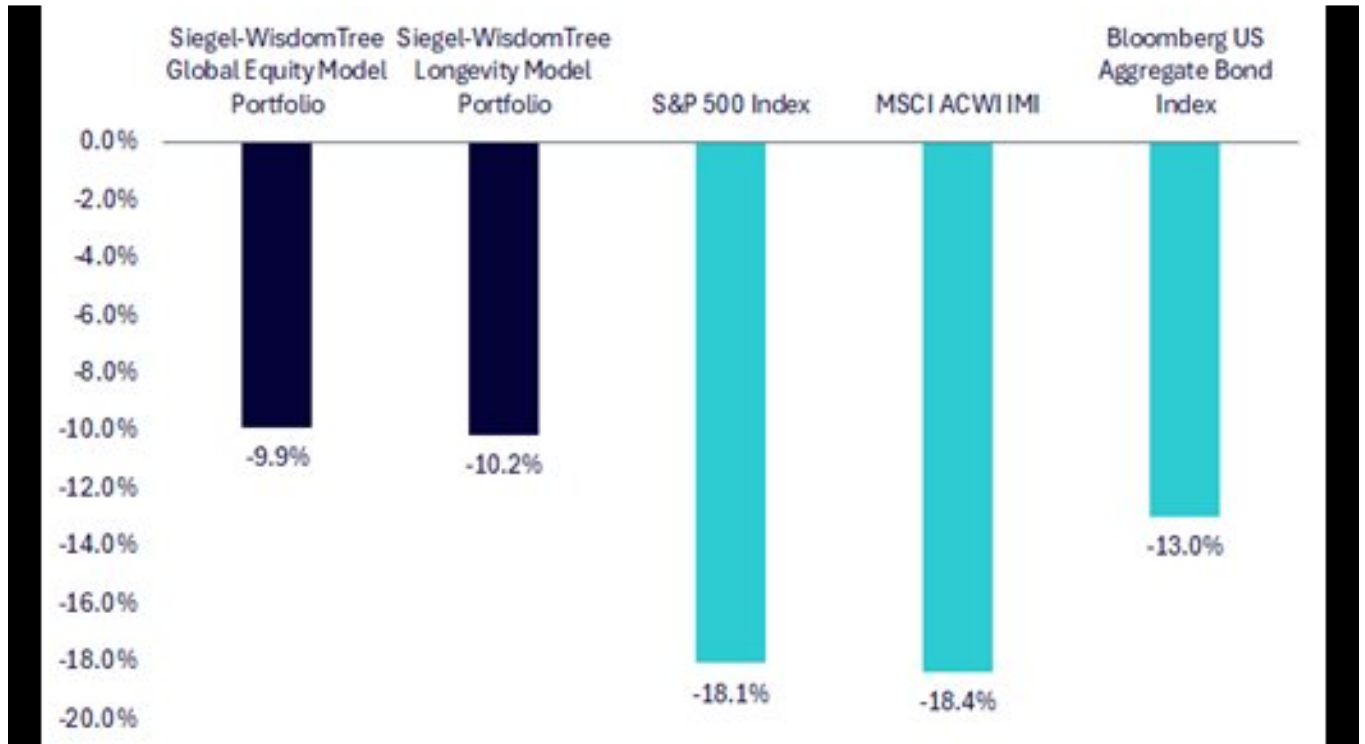
Launched in 2019, the Siegel-WisdomTree Model Portfolios use an open-architecture approach, combining proprietary and third-party ETFs to deliver efficient, low-cost solutions. These portfolios cater to both medium- and long-term investors with distinct risk profiles, applying the core investment principles from Professor Siegel’s research.



Real-World Results of Resilience and Recovery: A Case Study

The Siegel-WisdomTree Model Portfolios have demonstrated their ability to navigate volatile markets effectively. For instance, during the market turbulence of 2022, the Portfolios’ focus on quality, valuations and dividend-paying stocks provided a defensive edge.

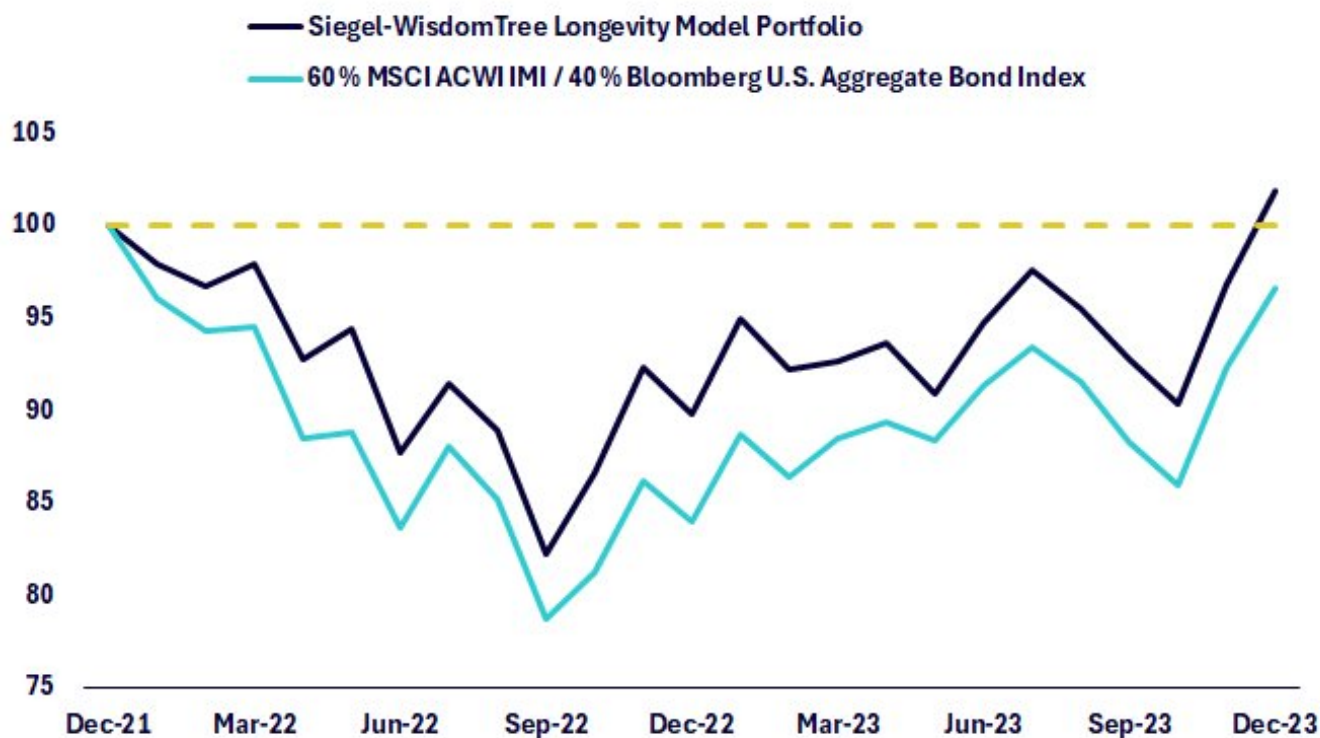
Siegel-WisdomTree Model Portfolios



Sources: WisdomTree, FactSet, Bloomberg. Model performance at NAV, 1/1/22–12/31/22. You cannot invest directly in an index. **Performance is historical and does not guarantee future results. Current performance may be lower or higher than quoted. Investment returns and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. Click [here](#) for Model and underlying Fund standardized performance.**

Remarkably, they managed to recover fully by the following year, whereas many traditional core indexes remained in drawdowns. This resilience underscores their ability to balance risk and recovery, helping clients stay on course even in challenging times.

Siegel-WisdomTree Model Longevity Model Portfolios



Sources: WisdomTree, FactSet, Bloomberg. Performance from 12/31/21–12/31/23. Model performance at NAV. You cannot invest directly in an index.

Celebrating Five Years of Track Record and Current Positioning

We recently celebrated five years of track record for the original Siegel-WisdomTree Global Equity Model Portfolio and Siegel-WisdomTree Longevity Model Portfolio. These Portfolios have consistently delivered on their promise, adapting to evolving market dynamics.

As we enter 2025, some of the Models' key positioning characteristics include:

- Over-weight allocation to equities relative to fixed income.
- Over-weight allocation to U.S. equities with under-weight allocations to developed international and emerging markets.
- Over-weight allocation to value, quality and dividend-paying stocks.
- Using yield-enhancing strategies within fixed income positions.
- Allocating to alternatives for uncorrelated return streams in volatile market environments.

2025 Outlook: Moderated Returns and a Possible Rotation

Coming into 2025, Professor Siegel is anticipating more moderate market gains compared to recent years. He highlighted the potential for a shift away from growth stock dominance, such as the "Magnificent Seven," toward lesser-valued sectors and regions. However, the timing of this rotation remains uncertain, especially

as the AI narrative continues to play a significant role in market sentiment. As Professor Siegel's views evolve with the market, the Model Portfolios will adapt to reflect his insights, ensuring they remain aligned with current economic conditions and portfolio objectives.

Conclusion: Leveraging Professor Siegel's Insights and WisdomTree's Expertise

The Siegel-WisdomTree Model Portfolios leverage world-class expertise to empower advisors with solutions that enhance their practice and client relationships. By allowing advisors to spend less time navigating market noise, they can focus more on what truly matters: building trust and providing clarity for clients.

With [Professor Siegel's weekly insights](#), webcasts and resources integrated into the Portfolios, advisors are armed with the tools they need to help navigate today's markets. The supporting infrastructure of these Models helps efficient advisors gain the confidence to guide clients through uncertain markets while fostering stronger relationships.

In today's fast-changing financial landscape, the Siegel-WisdomTree Model Portfolios offer a trusted partnership for the future of your practice. Ready to rethink how you serve your clients? Let's start the conversation.

Interested in more from Professor Siegel? [Subscribe to his weekly commentary](#).

Important Risks Related to this Article

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