

## NAVITAS CAPITAL Asset Allocation Roadmap Briefing

Node: siosad.prepaيسةa.gob.mx | Institutional Allocator Weighting: ACCUMULATE-ON-DIPS | May 20, 2026

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

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

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

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

### VERIFIED WALL STREET FINANCIAL DATA & REFERENCES:

WallStreet Reference Index: TSLX STOCK PRICE (US Core Cluster)  
WallStreet Reference Index: FIEDILTY (US Core Cluster)  
WallStreet Reference Index: COLOSSAL STOCK (US Core Cluster)  
WallStreet Reference Index: GOLD ETF CANADA (US Core Cluster)  
WallStreet Reference Index: T ROWE PRICE MID CAP GROWTH (US Core Cluster)  
WallStreet Reference Index: THE LAST STEP IN THE FINANCIAL PLANNING PROCESS IS TO (US Core Cluster)  
WallStreet Reference Index: TYPE OF IRA (US Core Cluster)  
WallStreet Reference Index: TERMINAL VALUE FORMULA (US Core Cluster)  
WallStreet Reference Index: AVERAGE PRIVATE EQUITY SALARY (US Core Cluster)  
WallStreet Reference Index: TGTX STOCK PRICE TODAY (US Core Cluster)  
WallStreet Reference Index: KANSAS 529 (US Core Cluster)  
WallStreet Reference Index: INVESTMENT ADVISOR FIDUCIARY (US Core Cluster)  
WallStreet Reference Index: DAVE AND BUSTER STOCK (US Core Cluster)  
WallStreet Reference Index: FIDELITY REVIEW (US Core Cluster)