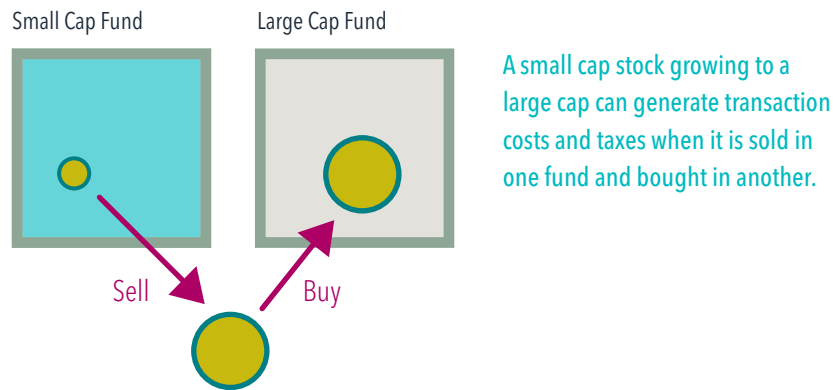
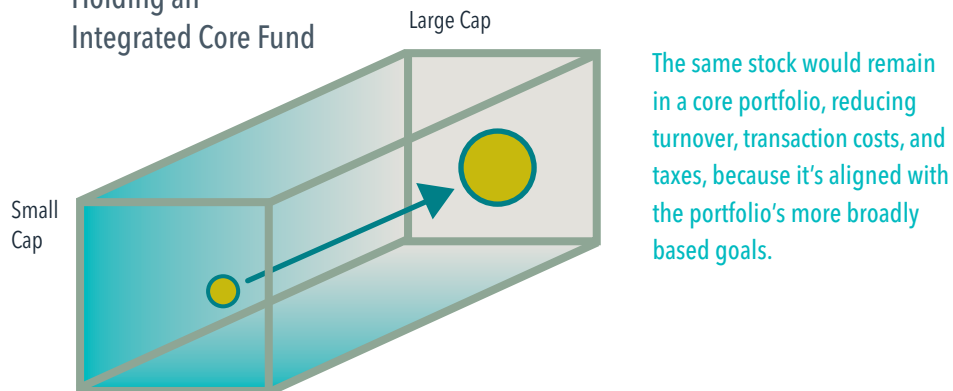


# Why Trade with Yourself? Core Funds Can Solve That Problem.

## Holding Multiple Funds in a Traditional Portfolio



## Holding an Integrated Core Fund



As an investor, does it make sense to sell a stock you own in one fund and then buy it back in another fund? Of course not. You would effectively be trading with yourself and paying the transaction costs.

- Consider a portfolio with one equity fund that invests in small cap stocks and another fund that invests in large caps. A small cap stock growing to a large cap might be sold out of the small cap fund and bought for the large cap fund.
- But in a core fund that can invest in both small caps and large caps, a stock that has grown in size would remain in the single fund, reducing turnover, transaction costs, and taxes.
- Dimensional offers numerous core funds designed to be cost-effective and broadly diversified. And our core funds have an additional objective of seeking to outperform the market by overweighting securities that research has shown have higher expected returns.

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*A core fund can deliver the potential advantages of investing across the market, but with lower turnover, transaction costs, and taxes than in a traditional portfolio owning multiple funds.*

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Risks include loss of principal and fluctuating value. Small cap securities are subject to greater volatility than those in other asset categories. Value investing is subject to risk, which may cause underperformance compared to other equity investment strategies. Diversification neither assures a profit nor guarantees against loss in a declining market. There is no guarantee an investment strategy will be successful.

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