

Wall Street and financial services companies are infamous for slick marketing phrases, and continuously rolling out products with psychologically appealing names. In this brief, 3-minute video, we look at one of the most recent products that has been strongly marketed over the past few years using the name, “Smart Beta.” Unfortunately, most of these products are quite expensive, and are usually nothing more than attempting to mimic what Dimensional Fund Advisors has been doing for years, which is essentially tilting a portfolio toward asset classes with higher expected returns, such as value and smaller company stocks. I hope you enjoy this informative video, and if so, feel free to share it with family and friends.