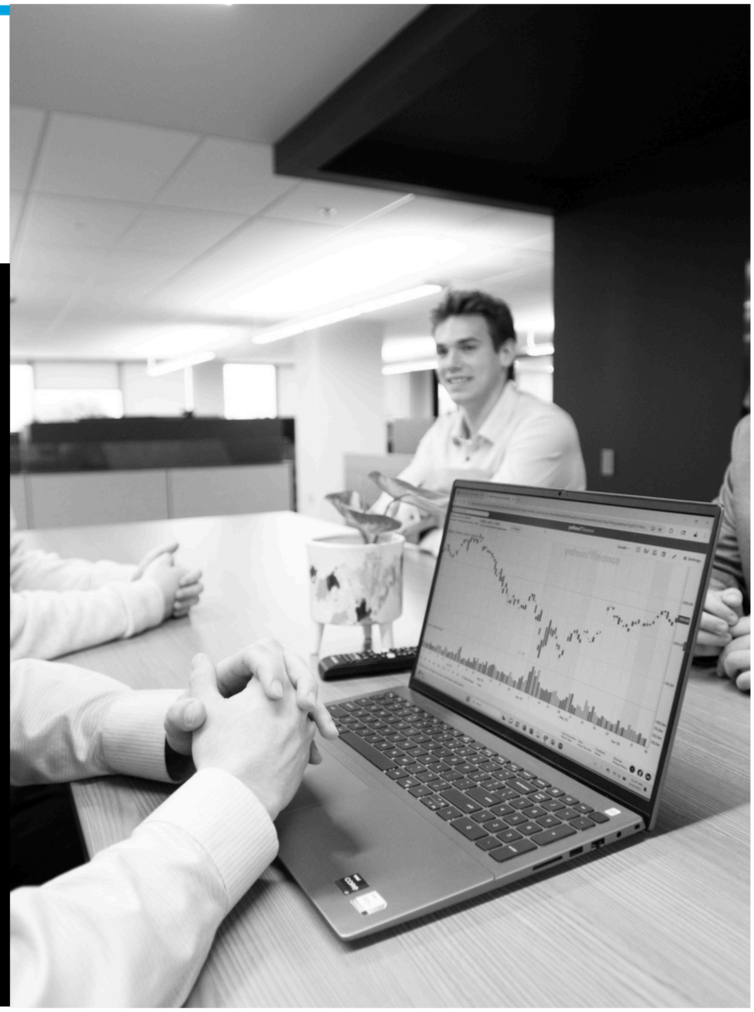
GENERATING PORTFOLIO INCOME IN A **RISING RATE ENVIRONMENT**



THEN VERSUS NOW:

Following the 2008 global financial crisis, the market had a decade-long period of "Zero Interest Rate Policy" (ZIRP). During this time, investors had to take on greater risk to get yield. Now, with interest rates more normalized, it can be easier to build a durable, diversified income stream without taking on the same level of risk.

WHAT'S CHANGING IN INCOME INVESTING?

In today's evolving interest rate landscape, generating reliable portfolio income requires a more strategic approach. The era of 'set it and forget it' fixed income investment has shifted. Yields are no longer anchored near zero, and investors have access to a broader toolkit of income-generating strategies across asset classes.

NEW INVESTMENT OPPORTUNITIES:

The current investment universe offers a broader toolkit of income-generating strategies across various asset classes. Layering modern strategies with traditional fixed-income investments can balance yield with stability.

OPTION-BASED ETFS
ETFS

These can capitalize on market volatility to generate income. Some of these ETFs can offer higher yields than traditional strategies. They are professionally managed, providing attractive payouts without requiring investors to manage contracts themselves.

OTHER
TOOLS

Other strategies include structured notes with protective barriers, Master Limited Partnerships (MLPs), Real Estate Investment Trusts (REITs), and more.

THE BOTTOM LINE:

Generating income from a portfolio is still very possible, but the method has changed. By combining traditional fixed income with modern strategies like options-based ETFs, REITs, structured notes, and other accessible alternative investments, investors can build portfolios that meet their income needs without taking on too much risk.

Working with an advisor can help you build clarity, confidence, and a plan that’s truly your own.

FIND YOUR PATH TOWARDS FINANCIAL SUCCESS

At Prime Capital Financial, our team of financial advisors are dedicated to helping you achieve your financial goals with personalized strategies and guidance. Charting your course towards financial success should be simple, free from jargon and distraction. We get it. And we’ve got you.

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