

StepStone Launches StepStone Total Portfolio Allocator, Bringing Institutional-Grade Private Markets Intelligence to Portfolio Construction

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New interactive modeling tool combines goals-based planning with SPI by StepStone's extensive proprietary private markets data to help financial professionals, Institutions and Retirement Plans immediately identify the impact an integrated private and public portfolio can have on investment goals

NEW YORK, Oct. 14, 2026 (GLOBE NEWSWIRE) -- StepStone Group (Nasdaq: STEP), a leading global private markets investment firm, today announced the launch of **StepStone Total Portfolio Allocator**, an interactive modeling tool that provides wealth management professionals and institutions a more informed way to explore how private markets complement public market portfolios.

Designed for private wealth firms and advisors, family offices, multi-family offices, small institutions, and defined contribution plan administrators, the tool makes sophisticated portfolio analysis intuitive and customizable. Leveraging SPI by StepStone, it incorporates unique data points, such as deal-level benchmarking, fund-level benchmarking, cash flow pacing model, real-time portfolio reporting and GP research into the calculations.

Users can begin with a public market risk profile, add private markets allocations across four asset classes and immediately compare hypothetical returns, volatility and risk-return metrics with an equivalent public-markets-only portfolio. They can also examine historical drawdowns and explore how modeled portfolios would have behaved through the Global Financial Crisis, COVID-19 and the 2022 rate shock—turning complex allocation questions into clear, visual comparisons.

"For decades, StepStone has helped sophisticated institutional investors build private markets portfolios around specific investment objectives," said Brett Schlemovitz, Partner and President of StepStone Private Wealth Solutions. "StepStone Total Portfolio Allocator puts that experience into the hands of a broader range of U.S. investors. Whether the objective is growth, income or a combination of the two, users can explore how private and public investments may work together in a goals-based portfolio—using the depth of data and insight that distinguishes StepStone in the market."

Built differently, StepStone Total Portfolio Allocator uses SPI by StepStone, which centralizes and analyzes private markets data from more than 20,000 general partners, 53,000 funds and 304,000 underlying investments. StepStone Total Portfolio Allocator brings proprietary intelligence into an accessible, interactive experience—giving users a private markets perspective that traditional portfolio tools may not provide. It is the most recent addition to StepStone Academy, the firm's education platform for financial professionals, which offers resources on private markets fundamentals, individual asset classes and portfolio implementation.

"The breadth of SPI by StepStone gives this tool a private markets foundation that is difficult to replicate," said Tyler Johnson, Partner and Chief Technology Officer, StepStone Group. "We transformed insights drawn from thousands of managers, funds and underlying investments into an intuitive modeling experience. Users can quickly test allocation tradeoffs, visualize hypothetical outcomes and better understand how private markets may align with their broader portfolio objectives."

Financial professionals, institutions and defined contribution plan sponsors can explore the new **StepStone Total Portfolio Allocator** at <https://total-portfolio-allocator.spi.stepstonegroup.com>

About StepStone Group

StepStone Group Inc. (Nasdaq: STEP) is a global private markets investment firm focused on providing customized investment solutions and advisory and data services to its clients. As of June 30, 2026, StepStone was responsible for approximately \$913 billion of total capital, including \$245 billion of assets under management. StepStone's clients include some of the world's largest public and private defined benefit and defined contribution pension funds, sovereign wealth funds and insurance companies, as well as prominent endowments, foundations, family offices and private wealth clients, which include high-net-worth and mass affluent individuals. StepStone partners with its clients to develop and build private markets portfolios designed to meet their specific objectives across the private equity, infrastructure, private debt and real estate asset classes.

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