



GROWTH FROM SECTOR INVESTING

The *ROTATE* strategy puts a greater emphasis on long-term growth than it does short-term preservation. We believe different sectors of the economy tend to perform better than others depending on where we stand in a given economic cycle, market cycle or even calendar year. There exists opportunity in trying to overweight the strong sectors and underweight the weak sectors. *ROTATE* is an active management strategy that gains market exposure through diversified economic sector investments and seeks to “ROTATE” that exposure as the underlying research models identify better opportunities. The emphasis on diversification is achieved not only through a material number of actual portfolio holdings, but also by bringing together up to three underlying sector rotation models. *ROTATE* is driven by a technical, rules-based investment process, using objective research and underlying strategies from our primary research partner, Dorsey Wright & Associates. The strategy is not restricted to holding a minimum percentage in stocks.

SUMMARY

- Targeted yet diversified exposure to multiple economic sectors
- Portfolio comprised of 5-11 holdings, selected from over 30 possible sectors, including commodity sectors
- Driven by objective technical research
- Focus on long-term growth
- Rigorous, repeatable, rules-based investment process
- Performance goal is to outperform S&P 500 over a 5-7 year time period
- Emphasis on transparency and communication

COMMUNICATION

- ✓ Trade Notifications
- ✓ Monthly Statements
- ✓ Quarterly Market Videos
- ✓ Quarterly Performance Reports

CHARACTERISTICS

- Investment Objective: Aggressive Growth
- Investment Horizon: Minimum of 5 Years
- Investment Minimum: \$25,000
- Benchmark: S&P 500

INVESTMENT PROCESS

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Continually bring together a large universe of economic sectors - Allowing for broad exposure to a wide range of industries, including commodities
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Put all of the sectors and representative holdings through a rules-based, relative strength weighted arm-wrestling contest – Removing emotions, judgement calls and individual subjective opinions from the investment process
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Create leaderboards by ranking the sectors and representative holdings from strongest to weakest – The process focuses its exposure at the top of these leaderboards and seeks to avoid exposure to the lowest rankings
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On a weekly basis, the research models are updated to determine if a change is needed.



No strategy assures success or protects against loss. This information is presented as an introduction to the portfolio strategy and for educational purposes. As such, it is not intended as a solicitation or offer. Prospective investors should contact his/her advisor for more detailed portfolio information and the product’s suitability in meeting your financial investment objectives.

Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for a client or prospective client’s investment portfolio.

