

OVERVIEW

Momentum is the documented tendency of investments to exhibit persistence in their performance, meaning sectors that have outperformed other sectors during a designated period of time, and continue to outperform. The TWM Beta strategy takes advantage of this effect by allocating money to stocks exhibiting the strongest momentum.

MANAGEMENT STYLE: Conservative **Aggressive**

OBJECTIVE

Growth is the primary objective of this strategy, principal protection is secondary.

STRATEGY

The strategy takes advantage of this momentum effect by allocating money equally to the five to ten stocks showing the strongest momentum. It also allocates money to a diversified basket of equity ETFs and a short-term tactical opportunistic / defensive overlay.

CRITERIA

Each month, the stocks in our system are rated based on momentum; money is then allocated as follows:

- 1) 0% - 40% is allocated equally to the five to ten stocks showing the highest momentum.
- 2) 0% - 40% is allocated to a basket of equity ETFs based on our proprietary momentum analysis
- 3) 0% - 20% is allocated to a short-term tactical opportunistic / defensive overlay that seeks to capitalize on short-term trends in the market, up or down.

Only stocks with positive momentum are chosen for inclusion.

DEFENSIVE OPTION

In times of no identifiable positive sectors, market uncertainty or high risk, assets can be moved to money market funds.

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