



## 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 Flagship Strategy takes advantage of this effect by allocating money to stocks and ETFs exhibiting the strongest momentum.

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**MANAGEMENT STYLE: Conservative**     **Aggressive**

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## 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 to the five to ten stocks and four ETFs showing the strongest momentum. The strategy also allocates money to 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% - 50% is allocated equally to the five to ten stocks showing the highest momentum.
- 2) 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.
- 3) 0 - 40% is allocated to the four ETFs showing the highest momentum.

***Only stocks with positive momentum are chosen for inclusion.***

## DEFENSIVE OPTION

***In times of market uncertainty or high risk, assets can be moved to money market funds***

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