



## 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 Legends strategy takes advantage of this effect by allocating money to stocks 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 equally to the five to ten stocks showing the strongest momentum. It also allocates money to a diversified basket of 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 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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