



OVERVIEW

A specialized, aggressive long term growth strategy which always maintains a 20% cash position (money market). The strategy is designed to capitalize on counter-trends at short term tops and bottoms in the market.

MANAGEMENT STYLE: Conservative Aggressive

OBJECTIVE

The goal is to achieve growth over the long term while seeking returns through investing in short term trends.

STRATEGY

The strategy uses a combination of long-term trend and short-term counter-trend analysis to allocate money to domestic stocks through ETFs and / or index mutual funds. Depending on market conditions, the strategy may take a position in a leveraged fund or ETF. Up to 80% may be invested in U.S. stocks, and up to 20% may be inversely invested.

This is a very well-diversified, trend-following model incorporating the additional advantage of our dynamic adaptability technology. Its tactical nature may result in any or all categories holding 100% cash for long periods of time.

CRITERIA

TWM Alpha maintains the following tactical allocations:

U.S. Stocks	0 – 80 %
Inverse U.S. Stocks	0 – 20 %
Cash / Money Market	20 – 100 %

DEFENSIVE OPTION

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

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