



## OVERVIEW

A specialized strategy designed for customizing individual client portfolios based on segregated time horizons, emphasizing aggressive growth through ETFs and / or index mutual funds.

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

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## OBJECTIVE

The 500 Strategy model seeks to beat the market over time by using quantitative analysis to identify then capitalize on likely short term tops and bottoms in the S&P 500. Designed for assets not needed for 5 years or longer, but due to the aggressive nature of this type of investing, should be funded with risk capital only.

## STRATEGY

This model is actively managed with a goal towards long term growth but allowing for somewhat higher volatility. Using a quantitative model it attempts to buy on weakness and sell on strength via short and intermediate term price movements in the S&P 500. This model will make 10-20 trades annually in the S&P 500 using ETFs and / or index mutual funds, and will be positioned either 100% in the S&P 500 or 100% in cash. Investments are selected using a proprietary process which continually measures market cycles and trends. No leveraged vehicles are used, and the portfolio does not take short positions – it is a *long position only* portfolio. This portfolio can be funded with qualified or non-qualified money.

## CRITERIA

TWM 500 maintains the following tactical allocations:

\_\_\_\_\_ **S&P 500: 0 – 100%** |  
 \_\_\_\_\_ **Cash: 0 – 100%** |

## DEFENSIVE OPTION

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

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