



OVERVIEW

The TWM Income Strategy uses a quantitative approach to actively manage a portfolio of fixed income ETFs and mutual funds. This is our most conservative strategy and is appropriate for income generation.

MANAGEMENT STYLE: Conservative ■ **Aggressive**

OBJECTIVE

TWM Income identifies and potentially capitalizes on both short and intermediate term price movements in a number of bond sectors, including: the Barclays Aggregate Index (a broad based index of bonds), High Yield Bonds, Treasury Bonds, Corporate Bonds, Emerging Market Bonds, and Treasury Inflation Protected Securities (TIPS). The strategy can also include dividend paying stocks.

STRATEGY

The strategy uses trend following and inter-market analysis with strict risk controls in determining entry points into the bond markets. Asset portions not positioned in the market will be held in cash. The tactical nature of this strategy can result in extended periods of assets being 100% allocated to cash.

CRITERIA

Our approach includes applications for analyzing trends and systems, which in turn analyze markets which move in tandem or inversely to bonds.

DEFENSIVE OPTION

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

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