



## 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 tend to continue to outperform. The TWM Momentum Series: Tactical All Asset Strategy takes advantage of this effect by allocating money to those areas relevant to the strategy exhibiting the most momentum in their respective markets.

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**MANAGEMENT STYLE:** Conservative      Aggressive

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## OBJECTIVE

The primary objective of this strategy is growth of capital; protection of principal is a secondary concern.

## STRATEGY

Based on the momentum of the sector, the strategy takes advantage of this effect by allocating money to four asset classes: Stocks, Bonds, Commodities, and Currencies.

## CRITERIA

Each month, we analyze those four sectors and rate them based on current momentum. Money is then allocated as follows:

- STOCKS:** 40% is split evenly between the top two stock sectors
- BONDS:** 20% is split evenly between the top two bond sectors
- COMMODITIES:** 20% is split between among the top two commodities
- CURRENCIES:** 20% is split between among the top two currencies

## DEFENSIVE OPTION

***Only sectors with positive momentum are chosen for inclusion. If no positive sectors can be identified, or in times market uncertainty or high risk, assets can be moved to money market funds.***

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