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 Allocation Strategy takes advantage of this effect by allocating money to those areas relevant to the strategy exhibiting the most momentum in their respective markets.

MANAGEMENT STYLE: Conservative ☐ ☐ ■ ☐ ☐ *Aggressive*

OBJECTIVE

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

STRATEGY

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

CRITERIA

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

- ❑ The highest allocation is given to the sector(s) with the highest momentum
- ❑ Lower allocations are given to the sector(s) with the lowest momentum

No allocation is given to the sector(s) with negative momentum.

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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