

## 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 Income 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 preservation of capital; growth is a secondary concern.

## STRATEGY

The strategy seeks to capitalize on the momentum effect by allocating money to a number of different bond sectors and dividend paying stocks based on the momentum of the sector.

## CRITERIA

Each month, we analyze every sector in our overall income basket. These sectors include Treasury bonds, TIPS, High Yield Bonds, Barclay's Aggregate index, Corporate Bonds, and Emerging Market Bonds, and dividend paying stocks. Each are scored according to current determined momentum and weighted against each other.

### Strategy Allocations:

1. The highest allocations are given to those sectors showing the strongest momentum
2. The lowest allocations are given to those sectors showing the weakest momentum

***No allocation is given to those sectors showing 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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### Tuttle Wealth Management, LLC

1 Stamford Plaza • 263 Tresser Boulevard • 9<sup>th</sup> Floor • Stamford, CT 06901

1-800-462-1655

mtuttle@tuttlewealth.com • www.tuttlewealth.com

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