



OVERVIEW

The TWM Tactical Multi-Strategy combines the advantages of three generally uncorrelated investing methodologies: momentum, short-term counter trends, and long-term trends.

MANAGEMENT STYLE: Conservative **Aggressive**

OBJECTIVE

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

STRATEGY

The approach blends three distinct, individual investing strategies: momentum, short-term counter-trend, and long-term trend.

Momentum is the observable and 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.

Short-term Counter-trend involves buying on weakness inside a longer uptrend, and selling on strength.

Long-term Trend takes positions on trending asset classes, holding them until the trend ends.

CRITERIA

Each month, we analyze stocks, bonds, commodities, and REITs through a proprietary research blend, and isolate the best options defined by the strategy. Money is then allocated as follows:

- Long-term Trends:** 25% exposure to REITs and commodities
- Short-term Counter-trend:** 25% exposure to U.S. stocks
- Momentum:** 25% towards highest-momentum bond classes
- All-asset Rotation:** 25% towards the highest momentum asset classes (stock / bonds / commodities / REITs)

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.

Tuttle Wealth Management, LLC

1 Stamford Plaza • 263 Tresser Boulevard • 9th Floor • Stamford, CT 06901

1-800-462-1655

mtuttle@tuttlewealth.com • www.tuttlewealth.com

