



## OVERVIEW

Our Black Swan strategy is designed to protect from market and economic turmoil by allocating money to traditional safe haven investments like Gold, Silver, Swiss Francs, Treasury Bonds, and select others as deemed appropriate.

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**MANAGEMENT STYLE: Conservative**      **Aggressive**

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## OBJECTIVE

Unlike some “Black Swan” type strategies that generate losses during up markets and large gains during down markets, this strategy is designed to deliver a balanced approach of attractive gains in up markets and principal protection during down markets.

## STRATEGY

The strategy allocates money to the “safe haven” assets exhibiting the strongest momentum. 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.

## CRITERIA

Each month, the safe haven assets in our system are rated based on momentum; money is then allocated to the four strongest areas. Typically we will allocate 25% to each sector. *Only sectors with positive momentum are chosen for inclusion*

## DEFENSIVE OPTION

***In times of no identifiable positive sectors, market uncertainty, or high risk, assets can be moved to money market funds.***

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