



Tactical Balanced

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 Institutional Series: Tactical Balanced 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 achieving growth while preserving principal. The strategy is designed exclusively for higher minimum investment (\$750,000) individual clients and institutional investors.

STRATEGY

The strategy takes advantage of the momentum effect by allocating money to four asset classes: Stocks, Bonds, Commodities, and Currencies based on momentum. This is a trend-following model incorporating the additional advantage of our dynamic adaptability technology. The tactical nature of this portfolio may result in any or all categories holding 100% cash for long periods of time.

CRITERIA

Monthly, each sector in the four asset classes are rated based on momentum. Money is then allocated as follows:

	Highest momentum global stock sectors	40%	
	Highest momentum global bond sectors	30%	
	Highest momentum currencies	10%	
	Highest momentum commodities	10%	
	Short-term momentum opportunistic / defensive overlay	10%	

DEFENSIVE OPTION

In times of market uncertainty or high risk, assets can be moved to money market funds.

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