



Tactical Growth

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 Growth 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; principal protection is secondary. 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	50%
Highest momentum global bond sectors	10%
Highest momentum currencies	15%
Highest momentum commodities	15%
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.

Tuttle Wealth Management, LLC

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

1-800-462-1655
