



## iSectors<sup>®</sup> Tactical Global Balanced Allocation

The objective of iSectors<sup>®</sup> Tactical Global Balanced Allocation is to seek modest growth of capital while attempting to avoid large portfolio draw downs (losses) through the implementation of a tactical strategy across a globally diversified portfolio of major asset classes.

### Portfolio Description

The iSectors<sup>®</sup> Tactical Global Balanced Allocation offers a comprehensive investment approach diversified across major global asset classes, including Domestic Equities, International and Emerging Market Equities, Bonds, Commodities, Gold and Real Estate. The model actively manages the investments within the portfolio, utilizing a proprietary trend-following methodology to allocate among the model's targeted asset classes and to cash (or short-term bonds). This model's objective is to be in 100% cash alternatives/short-term bonds during prolonged declines in individual asset classes to reduce overall portfolio draw down. The iSectors<sup>®</sup> Tactical Global Balanced model seeks to invest in index exchange-traded funds (ETFs) to achieve its objectives.

Asset Class Selection <sup>1</sup>	
Commodities	Up to 20%
Gold	Up to 20%
Domestic Equity—Large Cap	Up to 10%
Domestic Equity—Small Cap	Up to 10%
Developed International	Up to 20%
Emerging Markets	Up to 20%
Aggregate Bond	Up to 20%
Real Estate	Up to 20%
Short Term Bonds/Notes	Up to 100%

### The Need For A Smarter Investing Strategy

Extraordinary market volatility has challenged many static allocation portfolios over the past half decade. This has caused investors to sell at inopportune times and/or avoid investing altogether. The iSectors<sup>®</sup> Tactical Global Balanced portfolio seeks to help investors match their need for growth with their desire for a lower-volatility portfolio. iSectors' research shows that investors may reduce portfolio volatility by selectively avoiding asset classes that are currently out of favor. In those instances, investors are often better served by holding cash. iSectors applies a systematic, trend-following approach to each of the asset classes in the portfolio. Using this objective algorithm, the model systematically invests in those asset classes which offer the potential for favorable returns while avoiding those asset classes that are in potentially protracted declines. The quantitative model is reviewed and reallocated on a monthly basis.

*For more detailed fee/performance/holdings information, please visit the iSectors website for the most recent fact sheet.*

<sup>1</sup>The sample target allocation/holdings information is as of 12/31/2022 and should not be considered a recommendation to buy or sell a particular security. There is no assurance that any specific securities listed will remain a part of the model. An investment in any iSectors<sup>®</sup> allocation model is not guaranteed and, at any given time, may be worth more or less than the amount invested.

**NOT FDIC INSURED | NOT BANK GUARANTEED | MAY LOSE VALUE**

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