



MACROFOCUS PORTFOLIOS

Portfolio Management Advice — Quantitative Market Trends — Disciplined Process — Web Delivery

The MacroFocus strategy utilizes funds as a medium and takes a macro view of possible choices for a focused portfolio that often finds hot sectors, regions, and fund managers.

Home

Investment Assistance Delivered. *MacroFocus Portfolios* provides investment advice through this website and associated notifications. We assist in the management of your portfolio, but you make the final decisions, and execute the trades. This arrangement is convenient for a self-managed 401(k) and for many young professionals who are comfortable with web applications and don't want to pay thousands for face-to-face advice. **How does that work? See our [SYNOPSIS](#) page.**

Our Approach We utilize funds, momentum, portfolio management, and value to deliver investment advice with only a small effort on the part of the client. Because this is done by computer, the fee is even smaller. Funds are the asset medium of choice because they reduce company risk (bankruptcy). Momentum is used as a filter to produce a short list of prospective funds with high momentum. A portfolio management process is used to further weed out funds that aren't doing so well despite having high momentum when purchased. Value is fundamental to a good investment, but it is approached indirectly. We believe that prices of assets that consistently produce value, will eventually reflect that value. The corollary is that price momentum measured over a long enough period will represent underlying value.

Is It Right for You? This service is designed to provide investment management assistance so that a hands-on type of investor can manage a portfolio with as little effort as an hour or so per week. It is definitely not a buy and forget service, and should not be undertaken without the concomitant dedication of a little time each week. We have models that cover a reasonable range of investment profiles. Our models require a relatively high turnover rate from time to time, and so are ideal for self-managed 401(k) or IRA accounts where the time horizon is also typically longish. See our [PROFILE](#) page to evaluate which model is best for you. The quantitative aspect of the methodology identifies funds that have long term momentum. We provide choices that meet a diversity requirement and are approximately equal in terms of momentum. Your review for a final decision can add value to the process. The process is not for everyone, and we recommend the utilization of our free six-month period to evaluate your ability to effectively utilize the service with a virtual portfolio.

Getting Started. There is no charge for access to the site, and each new portfolio is free during a trial period of six months. Just follow the steps on the [SYNOPSIS](#) page to get started. You can try it out with a virtual portfolio (recommended) or a real one.