

WHILE OTHER ASSET MANAGERS FOCUS  
ON ALPHA, OUR FIRST FOCUS IS ON  
MANAGING RISK.

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INDEX SOLUTIONS

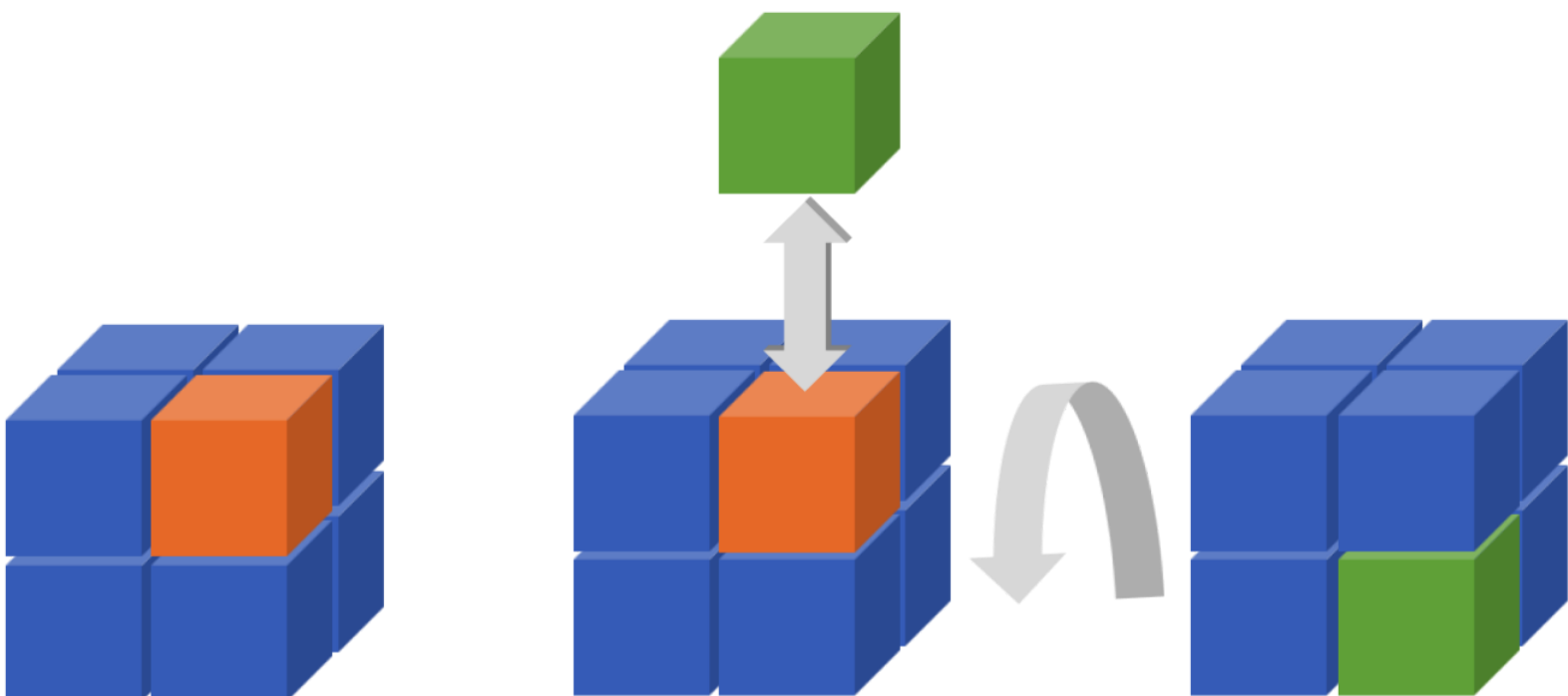
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As economic tailwinds from the last thirty years turn into headwinds, achieving traditionally simple investment objectives is an increasingly complex and risky undertaking.

Newfound offers a modern suite of quantitatively-managed, risk-focused tactical portfolios designed for both the destination and the journey.

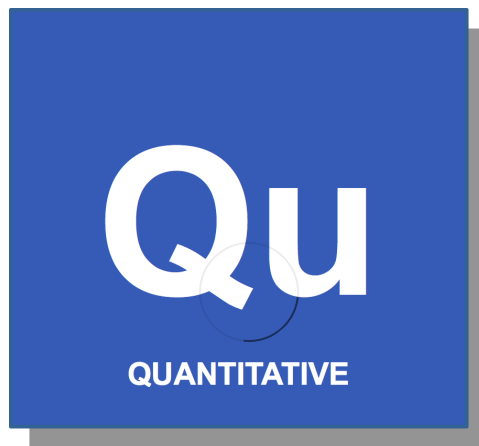
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**Tactical Asset Allocation:** Opportunistically adapt and rotate portfolio exposures away from areas of perceived weakness.

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## THE FOUNDATIONAL ELEMENTS OF OUR INVESTMENT PROCESS



We believe in quantitatively-driven investment approaches, powered by the evidence-based insights of consistent, thoughtful research. We focus on the application of value, momentum, carry, defensive, and trend in tactical asset allocation.

We believe process consistency is paramount for long-term investment success and is best achieved through systematic approaches which help mitigate the behavioral biases that often lead to poor investment decisions.

# Be

BEHAVIORAL

Investing shouldn't be complicated, but that doesn't mean it is easy. Emotional decisions can derail even the best laid investment plan. Therefore, we believe the optimal investment plan is, first and foremost, the one we can stick with.

We know investors care deeply about protecting the capital they have worked hard to accumulate, so we seek to improve risk-adjusted returns by prioritizing downside risk (drawdown) management.



## C O N T A C T



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# Ready to rethink how you manage risk in your portfolio?

LET US HELP ([HTTP://WWW.THINKNEWFOUND.COM/CONTACT](http://www.thinknewfound.com/contact))

## ABOUT

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**While other asset managers focus on alpha, our first focus is on managing risk.**

We know investors care deeply about protecting the capital they have worked hard to accumulate. And as investors approach and enter retirement, managing “sequence risk” becomes even more important.

Newfound Research is a quantitative asset management firm with a focus on risk-managed, tactical asset allocation strategies. We were founded in August 2008 and are based out of Boston, MA.

We work exclusively with institutions and financial advisors.

## ADDITIONAL LINKS

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## WEEKLY COMMENTARY

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