Where strategy meets IQ

The traditional equity market portfolio modeling typica
long-only, industry sectors for diversification, and som
income to “round out” the portfolio.

We believe this is a deeply flawed assumption when lin
to such simplistic criteria. The 10 major S&P 500 inc
(Consumer Discretionary (XLY), Consumer Staples (XLP)
Financials (XLF), Health Care (XLV), Industrials (XLI), Ma
Real Estate (XLRE), Technology (XLK), and Utilities (XLU
correlated to the overall S&P 500 index and broad

Cross correlation can be detrimental to portfo
especially in conditions like the 2008 bear marke

These high correlation levels do NOT enhance overa
diversification, especially in equity bear markets whe
stocks and sectors are pulled down with the rest of t
Another major issue is that various "smart strategies"
equity, long/short, convertible arbitrage, emerging ma
driven, equity market neutral, fixed income arbitrage, m
traditional multi-strategy, and distressed equity inves
highly correlated to the S&P 500 index in times of extr
stress and, indeed, to each other.

We believe an approach of blended multi-strategy active
a superior way of providing true diversification and nega
We feel this results in the opportunity to capture growth
market crisis and massive drawdowns.

BLENDED APPROACH

(Blended Passive Management of Investments)

Traditionally, a large number of RIA's and their clients choose a blend
passive management.

We believe that a blended active management strategy will produce more
The comparison, historically, demonstrates more than double th

With a deep research culture, our mission is to bring the potential bene
institutions and individuals by offering diverse investment strategies th
unique goals of each investor.

Past performance is no guarantee of future results. There is risk of loss. You can lose money in a managed f
impacted by any commissions and/or fees charged by products, managers, investment ac