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SYMMETRY PANORAMIC

US Equity Fund

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OUR
INVESTMENT STRATEGY

Our Philosophy
STORY

At the core of Symmetry's philosophy is the belief that the needs of investors should always come first.

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COMPANY BACKGROUND

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INVESTMENT STRATEGY

Investment Process

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SYMMETRY PANORAMIC
Mutual Funds

A family of eight multi-factor, 1940 Act mutual funds advised by Symmetry Partners, LLC

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NO EMOTIONS

Advised by [Symmetry Partners](#), LLC, Symmetry Panoramic Mutual Funds is a family of eight multi-factor, 1940 Act mutual funds, including the [Symmetry Panoramic U.S. Equity Fund](#), [International Equity Fund](#), [Global Equity Fund](#), [Tax-Managed Global Equity Fund](#), [U.S. Fixed Income Fund](#), [Global Fixed Income Fund](#), [Municipal Fixed Income Fund](#), and [Alternatives Fund](#).

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Panoramic Mutual Funds by Symmetry Partners, LLC,

151 National Drive, Glastonbury, CT 06033

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CONSIDER THE FUNDS' INVESTMENT OBJECTIVE, RISK, AND CHARGES AND EXPENSES. THIS AND OTHER INFORMATION CAN BE FOUND IN THE FUNDS' [PROSPECTUS](#) WHICH CAN BE OBTAINED BY CALLING 1-844-SYM-FUND (844-796-3863). [PLEASE READ THE PROSPECTUS CAREFULLY BEFORE INVESTING.](#)

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Diversification seeks to reduce volatility by spreading your investment dollars into various asset classes to add balance to your portfolio. Using this methodology, however, does not guarantee a profit or protection from loss in a declining market.

Rebalancing assets can have tax consequences. If you sell assets in a taxable account you may have to pay tax on any gain resulting from the sale. Please consult your tax advisor.

Symmetry Partners' investment approach seeks enhanced returns by overweighting assets that exhibit characteristics that tend to be in accordance with one or more "factors" identified in academic research as historically associated with higher returns. Please be advised that adding these factors may not ensure increased return over a market weighted investment and may lead to underperformance relative to the benchmark over the investor's time horizon. The factors Symmetry seeks to capture may change over time at its discretion. Currently, the major factors in equity markets used by Symmetry and some associated academic research are: the market risk premium (Sharpe, William F. "Capital Asset Prices: A Theory of Market Equilibrium under Conditions of Risk." *The Journal of Finance*, Vol. 19, No. 3 (Sept. 1964), 425-442.), value (Fama, Eugene and Ken French. "Common risk factors in the returns on stocks and bonds." *Journal of Financial Economics*, 33, (1993), 3-56.), small (Banz, Rolf W. "The Relationship Between Return and Market Value of Common Stocks." *Journal of Financial Economics*, 9 (1981), 3-18.), profitability (Novy-Marx, Robert. "The Other Side of Value: The Gross Profitability Premium." *Journal of Financial Economics*, 108(1), (2013), 1-28.), quality (Asness, Clifford S.; Andrea Frazzini; and Lasse H. Pedersen. "Quality Minus Junk." Working Paper.), momentum (Jegadeesh, Narasimhan and Sheridan Titman. "Returns to Buying Winners and Selling Losers: Implications for Stock Market Efficiency." *The Journal of Finance*, Vol. 48, No. 1, (March 1993), 65-91), and minimum volatility (Ang, Andrew, Robert J. Hodrick, Yuhang Xing and Xiaoyan Zhang. "The Cross-Section of Volatility and Expected Returns." *The Journal of Finance*, Vol. 61, No. 1 (Feb. 2006), pp. 259-299.) On the bond side, Symmetry primarily seeks to capture maturity and credit risk premiums (Ilmanen, Antti. *Expected Returns: An Investor's Guide to Harvesting Market Rewards*. WileyFinance, 2011, p157-158 and 183-185). All data is from sources believed to be reliable but cannot be guaranteed or warranted.