

A TACTICAL ROTATION STRATEGY

STRATEGY BUILT UPON AWARD WINNING PAPERS

Click below to download summary versions

- 1 An Intermarket Approach to Beta Rotation
- 2 An Intermarket Approach to Tactical Risk Rotation
- 3 Lumber: Worth Its Weight in Gold

OVERVIEW

The ATAC Rotation Fund is a tactical strategy that is designed to generate absolute returns across multiple market cycles.

The Fund rotates offensively or defensively based on historically proven leading indicators of volatility, with the goal of taking less risk at the right time.

ATAC is managed by Pension Partners, LLC, an independent registered investment advisor.

[FIND OUT MORE](#)

5 REASONS TO INVEST IN ATAC

1. Add Diversification Benefits to Your Portfolio
2. Ability to Mitigate Risk in Times of Stress
3. Ability to Generate Positive Returns in Both Up and Down Market Environments
4. Hedge Against the Risk of Rising Interest Rates
5. Systematic and Objective Process

[Learn more](#)

FREQUENTLY ASKED QUESTIONS

How are the investments in the Fund determined?

What is the underlying concept of the approach?

What are the instruments used in the Fund?

How do you manage risk in the portfolio?

What share classes are offered?

[LEARN MORE](#)

NEWSLETTER SIGNUP

Sign Up For Our Latest Updates

Submit

For Unique Investing Perspectives

Mutual fund investing involves risk. Principal loss is possible. Because the Fund invests primarily in ETFs, it may invest a greater percentage of its assets in the securities of a single issuer and therefore is considered non-diversified. If a Fund invests a greater percentage of its assets in the securities of a single issuer, its value may decline to a greater degree than if the fund held were a more diversified mutual fund. The Fund is expected to have a high portfolio turnover ratio which has the potential to result in the realization by the Fund and distribution to shareholders of a greater amount of capital gains. This means that investors will be likely to have a higher tax liability. Because the Fund invests in Underlying ETFs an investor will indirectly bear the principal risks of the Underlying ETFs, including but not limited to, risks associated with investments in ETFs, large and smaller companies, real estate investment trusts, foreign securities, non-diversification, high yield bonds, fixed income investments, derivatives, leverage, short sales and commodities. The Fund will bear its share of the fees and expenses of the underlying funds. Shareholders will pay higher expenses than would be the case if making direct investments in the underlying funds.

The Fund's investment objectives, risks, charges, expenses and other information are described in the statutory or summary prospectus, which must be read and considered carefully before investing. You may download the statutory or summary prospectus or obtain a hard copy by calling 855-ATACFUND or visiting www.atacfund.com. Please read the Prospectuses carefully before you invest.

Correlation is a quantity measuring the degree to which two or more attributes or measurements show a tendency to vary together.

Beta is a measure of the volatility, or systematic risk, of a security or a portfolio in comparison to the market as a whole.

Duration is a measure of the sensitivity of the price (the value of principal) of a fixed-income investment to a change in interest rates.

The S&P 500, or the Standard & Poor's 500, is an American stock market index based on the market capitalizations of 500 large companies having common stock listed on the NYSE or NASDAQ.

Absolute return strategies are not designed to outperform stocks and bonds during strong market rallies.

Diversification does not assure a profit or protect against a loss in a declining market.

The Lipper Absolute Return Index consists of absolute return funds which are Mutual, Pension or Insurance Funds which aim for positive returns in all market conditions. The funds are not benchmarked against a traditional long only market index but rather have the aim of outperforming a cash or risk-free benchmark.

The Fund is only offered to United States residents, and information on this site is intended only for such persons. Nothing on this web site should be considered a solicitation to buy or an offer to sell shares of our Fund in any jurisdiction where the offer or solicitation would be unlawful under the securities laws of such jurisdiction.

The **2014 Charles H. Dow Award** was open to anyone with an interest in technical analysis who submitted a paper prior to the deadline. The Papers were judged on the following standards; the paper is based upon the concepts of technical analysis, the topic is substantive, the research is thorough, include the results of applying the technique to a sufficient quantity of data that covers at least one full market cycle and preferably longer, shows the application of accepted standards of testing (including but not limited to, statistical significance, Chi Square, Monte Carlo simulations, and statistical correlation), the writing meets generally accepted standards of style for publications and college level writing, the analysis and conclusions are useful and enhance the understanding of market action, a paper shall not have been previously published in any media made available for public dissemination, and a paper should be written for an audience of knowledgeable technical analysts. The judging panel reserves the right to not select a winner if it deems that there are no submissions that are worthy of being given the award. The **NAAIM Wagner Award** was open to all investment practitioners, academic faculty and doctoral candidates in the field. The papers were judged on the following criteria; practical significance to practitioners of active investing (which NAAIM broadly defines as investment strategies and techniques that improve upon the risk-adjusted return obtainable from a passive, buy-and-hold, investment strategy), quality of exposition, analytical rigor, and novelty of results. An ideal paper would provide evidence of the validity of an active investing approach via an example of a trading system that outperforms the market by some well accepted metric such as risk adjusted return, annual return, drawdowns, etc. Examples of supporting evidence sought include backtesting details and parameter sensitivity analysis. A jury of scholars and investment professionals reviewed and awarded the prizes. The National Association of Active Investment Managers or NAAIM was formed in 1989 as a non-profit association of registered investment advisors who provide active money management services to their clients, in order to produce favorable risk-adjusted returns as an alternative to more passive, buy and hold strategies.

Click [here](#) for a current ATAC Rotation Fund prospectus.

©2019 Pension Partners LLC, All Rights Reserved.

ATAC Rotation Fund is distributed by Quasar Distributors, LLC.