

Wall Street Solutions with Main Street Values

U.S. GROWTH PORTFOLIO

We have created outcome based, proprietary investment models that are designed to pursue real life objectives. We build portfolios based on investor needs, which have a conservative bias and that can deliver impactful results.

Helping our clients properly manage market risk is our most important role. It's why we believe in a more dynamic, proactive approach to portfolio management. It's one that calls for strategic asset allocation, tactical overweighting and underweighting of each component, and short-term adjustments to each client's long-term strategy.

U.S Growth Portfolio: sector rotation strategy

Objective

Our U.S. Growth Portfolio seeks to achieve a greater return than the S&P 500 over a complete market cycle while experiencing below average volatility. The portfolio expects to accomplish this by utilizing a sector rotation strategy which evaluates the 11 primary sectors of the S&P 500 + Metals, Mining, and Cryptocurrency and then invests in those sectors deemed to have the greatest opportunity. There is a minimum of 0% and a maximum of 40% in any one sector at the time of any re balance. The portfolio will invest in securities that are liquid and readily tradeable on a daily basis.

Key facts

Asset Class/Market Cap:
Equity/All Cap

Geographic Exposure:
Domestic

Benchmark:
S&P 500 – 100%

Investment strategy

This strategy utilizes our proprietary research techniques to find ETF and mutual fund solutions. Our proprietary methodology and execution not only creates short-term investment opportunities within the portfolio but, more importantly, reduces the amount of risk taken. We also believe our thematic asset allocation tilts and active rebalancing will reduce volatility and add to the total portfolio return over the long-term.