

# ETF Diversified Growth

*A diversified three-sleeve portfolio designed to balance stability, tactical sector opportunities, and contrarian value investing.*

The ETF Diversified Growth portfolio combines diversified core holdings, tactical sector leadership, and contrarian value investing. The Core sleeve anchors the portfolio with broad global exposure and income generation, while Sector Rotation dynamically captures leading S&P 500 sectors. Opportunistic Value adds a contrarian edge by targeting undervalued areas of the market. Together, the three sleeves create a balanced, adaptable portfolio built to pursue growth, income, and alpha across varying market conditions.

CORE	SECTOR ROTATION	OPPORTUNISTIC VALUE
60%	20%	20%
<p><b>Overview</b> - Provides the foundation of the portfolio with a diversified blend across growth equities, U.S. dividend-paying companies, small-cap stocks, international markets, and a covered call strategy to enhance overall portfolio yield.</p> <p><b>Goal</b> - Seeks to develop long-term capital appreciation and income generation while maintaining exposure to different styles and regions of the global market.</p>	<p><b>Overview</b> - Tactical sleeve leverages our team's proprietary sector ranking system, which integrates both fundamental and technical analysis to identify the most attractive sectors within the S&amp;P 500.</p> <p><b>Goal</b> - This systematic approach allows us to lean into market leadership trends while dynamically adjusting as conditions evolve, aiming to capture excess returns realistic to a static sector exposure.</p>	<p><b>Overview</b> - Focuses on uncovering undervalued sub-industries of the market where investor sentiment is overly pessimistic.</p> <p><b>Goal</b> - Strategy seeks to benefit from market mispricing and eventual mean reversion. The approach is inherently contrarian, designed to take advantage of dislocations created by short-term fear.</p>

*Past performance is not indicative of future results and diversification does not ensure a profit or protect against loss. All investments carry some level of risk, including loss of principal. Allocations are labeled as overweight, underweight, and neutral weight to indicate how the portfolio is currently allocated for stock selection purposes.*