Equity Leaders Portfolio

Overview

The Equity Leaders portfolio is a risk-managed, individual equity/ETF portfolio designed to own the top-rated (as defined by a proprietary measure of company/industry performance and earnings strength) stocks in each S&P 500 sector while overweighting exposure to leading sectors and underweighting exposure to lagging sectors.

Equity Leaders owns a mix of top-rated individual equities, sector ETFs, and sub-industry ETFs. Allocations and sector weightings are discretionary, though decisions are guided by a proprietary sector ranking system which aims to identify which S&P 500 sectors are preferred, and which are not. The result is an equity portfolio that aims to position itself in true leadership now and in the future.

Unlike many traditional equity programs, Equity Leaders has the ability raise a cash position in the event of severely market conditions. This risk-managed approach allows the program to compete with equity indexes in positive market conditions while striving to preserve capital in negative conditions.

The overall risk level of the portfolio is considered to be aggressive. The appropriate investing timeframe is 5-7 years. The investment minimum is $100,000.

A Unique Approach to Equity Exposure

Goal	Method
Own the Equity Leaders	Own the top-rated stocks in each sector
Overweight Sector Leaders	Overweight stock/ETF exposure to leading sectors
Underweight Sector Laggards	Underweight stock/ETF exposure to lagging sectors
Manage Risk	Ability to raise cash in negative environments
Hold Market Leadership	Own market sector and factor leadership via ETFs

While there are other factors that contribute to the Equity Leaders strategy, this table represents the primary goals of the methodology. The combination of leadership-oriented selection and risk management provides a unique approach to individual equity. This portfolio is geared towards clients looking to participate in the US stock market while also having a methodology in place to address the next bear market.

Summary

Investment Style:	*Equity*
Methodology:	*Risk-Managed, Active Equity Selection*
Asset Category:	*Individual Equities, ETFs*
Risk Level:	*Aggressive*
# of Holdings:	*20-30*
Investing Time Frame:	*5-7 Years*
Portfolio Minimum:	*$100,000*