



Tactical Trend

Objective

Match or exceed the performance of the stated benchmark (65% S&P Global Broad Market Index and 35% Bloomberg Intermediate U.S. Government/Credit Index) by generating investment appreciation through the tactical allocation of capital.

Investment Approach

Offer exposure to multiple asset classes primarily through exchange-traded funds (ETFs). May also invest in individual equities, fixed-income securities, and money market instruments.

Highlights

- Tactical allocation of capital
- Flexibility to respond to changes in the market and re-allocate to the strongest asset classes
- Use of relative strength to identify broad shifts in asset classes
- Use of trend and price analysis to focus on specific entry and exit points for securities

Investment Philosophy

Utilize trend, price, and relative strength to identify favorable investment opportunities among 6 asset classes:

- Domestic Equities
- International Equities
- Fixed Income
- Commodities
- Currencies
- Cash

Allocation of assets to the highest ranked asset classes at any point in time.

Rotate capital to specific markets that portfolio managers believe offer the strongest potential for price appreciation, while attempting to control risk by underweighting or eliminating exposure to markets exhibiting negative price trends and elevated risk.

Portfolio Manager



Matt McAleer
President &
Director of Private Wealth

Rider University,
BS Marketing / Economics

Disclosure: Different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment, investment strategy, or product (including the investment strategies recommended or undertaken by Cumberland Advisors), equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. The portfolio discussed above does not use leverage. It is not our intention to state or imply in any manner that past results and profitability are an indication of future performance. This does not constitute an offer to sell or the solicitation or recommendation of an offer to buy or sell any securities directly or indirectly herein.

The benchmark for the Tactical Trend style is 65% S&P Global BMI (Broad Market Index) and 35% Bloomberg Intermediate U.S. Government/Credit Index, rebalanced monthly. The S&P Global BMI (Broad Market Index) comprises the S&P Developed BMI and S&P Emerging BMI, and is a comprehensive, rules-based index measuring stock market performance globally. The Bloomberg Intermediate U.S. Government/Credit Index tracks the performance of intermediate term U.S. government and corporate bonds.