

## Investment Philosophy

### THE ETF STORE APPROACH

Underlying our client process is our core philosophy, which is based on a top-down, macro-economic approach in which we strive to add value and reduce risk by tactically allocating client assets among various asset classes.

#### RIGHT ASSETS AT THE RIGHT TIMES

Rather than picking individual stocks, we place more importance on being in the right asset classes at the right times. We engage in exhaustive economic and market-based research and meet regularly as a team to accomplish this objective. Our approach seeks to keep us invested in the best performing markets and asset classes around the globe. We believe that by using ETFs, we can provide the best portfolio asset allocation in the most efficient manner.

#### PROPRIETARY ETF SCREENING PROCESS

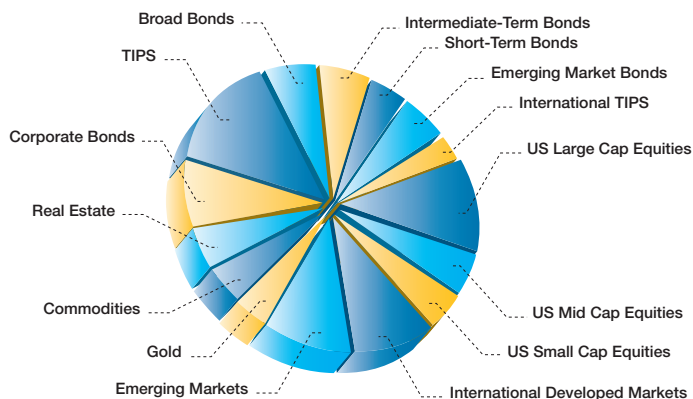
Our thorough ETF screening process evaluates the entire ETF universe and identifies those ETFs that we believe provide the best opportunity for maximizing your returns. We

start by reviewing all ETFs available and screening out those ETFs with insufficient liquidity, which are not suitable for longer holding periods, with leverage, with too narrow a focus or which are not well constructed. We also evaluate such factors as an ETF's expense ratio, concentration of individual holdings, and tax efficiency. From the remaining universe, we choose the ones that best represent the asset classes, markets, and sectors that we feel should be considered for use in our investment strategies.

#### PROPRIETARY INVESTMENT METHODOLOGIES

Our portfolios are managed by seasoned and respected professionals who have experienced the ups and downs of many market cycles, while managing and protecting billions of dollars in investor assets. We use proprietary quantitative methodologies to identify those assets, markets and sectors that are exhibiting the most positive price trends. In addition to ETFs selected from our quantitative model, we also select certain ETFs that we feel are uniquely positioned to benefit from fundamental trends in the global or local economies and/or that increase the diversification and risk management of the quantitative portfolio.

### GLOBAL CORE PORTFOLIO



#### CONTACT US

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