1. Strategic Asset Allocation Models

The ASG Strategic Asset Allocation Models are five auto-pilot portfolios built with low-cost index funds with set allocation percentages to various asset classes which rebalance on a periodic basis to maintain diversification. These models are based on Modern Portfolio Theory (MPT) which emphasizes diversification as a method of reducing risk and enhancing long-term returns. The target allocation within each of the five models are based upon an investor's individual volatility tolerance, time horizon, and investment objective.

2. Protective Asset Allocation Portfolio

This strategy uses **a simple rule-based approach to move investments to cash quickly** when the market shows signs of declining in an effort to avoid deep losses. Each month, the strategy picks from twelve global investment options and holds up to six at a time, focusing on those with positive twelve-month momentum trends.

3. Defined Outcome Buffered ETF Strategy

This portfolio is constructed using a pool of defined outcome / buffered ETFs, diversified across major equity asset classes. The objective is to **mitigate potential losses by using option-wrapped ETFs** that target annual capped returns of between four and ten percent in exchange for "buffered" exposure to full downside of the equity markets in any given year.

4. Diversified Income Portfolio

This strategy aims to provide higher income than the benchmark by subjectively creating **a portfolio holding a diversified mix of income-producing funds, including bonds, dividend-paying stocks, and other income-generating investments.** It is designed specifically for tax-advantaged accounts because of the tax inefficient composition of the portfolio and changes can be made as economic conditions warrant.

5. IFP Tactical Balanced Strategy

IFP Tactical Balanced Strategy provides a **balanced and risk-managed portfolio targeting a 60% equity and 40% fixed income allocation**. Designed to adapt to changing conditions, the strategy can adjust equity exposure anywhere between 40% and 60%. Using a quantitative, rules-based approach, the strategy identifies top-performing global equity opportunities while dynamically allocating to high-performing bond asset classes or cash based on market momentum. With the flexibility to focus on specific asset classes, sectors, or regions, the strategy seeks to enhance total returns while mitigating downside risks. This streamlined approach offers investors a sophisticated solution for balanced growth in evolving market environments.

6. International Rotation ETF Portfolio

This strategy focuses on stock markets in developed countries outside the U.S. **An algorithm evaluates twenty-four country-specific ETFs each month based on a composite of momentum-based factors, selecting the top two with the highest rank.** The portfolio is adjusted monthly with the goal of maintaining optimal performance.

7. Boosted Global ETF Portfolio

This strategy also uses the "Battle Royale" algorithm to evaluate one hundred thirty-one global ETFs (exchange-traded funds). **It selects the top two to four ETFs based on their predicted alpha*,** aiming to improve overall portfolio returns by focusing on selecting ETFs holding the most promise for upside potential. It is common for this strategy to rotate holdings on a month-to-month basis.

8. Quality Stock Model

This strategy invests in **thirty financially strong companies with consistent profitability, high earnings and management quality, and low leverage.** It aims to maintain a balanced portfolio by equally weighting each stock and updating the selections annually based on strict criteria.

9. Dividend Growth Stock Model

This strategy focuses on holding the stock of **thirty companies with a history of paying and increasing dividends.** Each stock is equally weighted, and the portfolio is reviewed annually to ensure it includes the most stable dividend-paying companies.

10. Multifactor Stock Model

This strategy selects from the 1000 largest U.S. stocks, eliminating those with poor financial stability. It then chooses **the top sixty stocks based on value, momentum, and quality,** ensuring a balanced and diversified portfolio. The individual stocks are weighted using an advanced optimization algorithm designed to correlate with the S&P 500 but with the goal of comparative outperformance over the long run.

11. Growth-at-a-Reasonable-Price Stock Model

This strategy focuses on the top 900 top-performing U.S. companies, excluding financial services and real estate sectors, to create **diversified portfolio of thirty stocks best demonstrating a balance between value and growth factor attributes**. The selection criteria also include concentration constraints to avoid overexposure to any single sector by imposing an allocation cap of twenty percent per included sector representation.

12. Boosted Domestic Stock Portfolio

This daily dynamic strategy uses an advanced tool called "Battle Royale" to analyze copious amounts of stock market related data. It compares each company in the Russell 1000 index against each other to identify top performers with the highest predicted future alpha*. **The portfolio invests in the top ten to fifteen companies identified by this process,** aiming for returns above the overall index through strategic trades one to three times a month.

13. Hedge Fund 10 Stock Model

This strategy screens data from top-performing hedge funds to create a **concentrated portfolio of ten stocks** that mirrors their highest convictions after eliminating complex investments like options and short-selling positions. The model focuses on hedge funds with strong track records and potentially trades the holdings each quarter after scrutinizing each of the funds' required public disclosures.

* Alpha is a term used to describe an investment strategy's ability to beat the market by providing excess return when compared to a specific benchmark, after adjusting for risk.