

# Researched Strategy Overview



Fixed Income & Strategic Income

Style: Tactical

## Description

The Researched Fixed Income and Strategic Income strategies are tactical approaches to investing in the fixed income markets. Investors who are most interested in these models seek capital preservation with a similar investment risk profile to that of the Barclays Aggregate Bond Index, but with a higher total return opportunity. The Fixed Income strategy targets this goal with a smaller risk and reward profile as the Strategic Income strategy, as outlined in the graphic below.

## Flexibility

The strategy will dynamically manage the interest rate and credit risk of the portfolio and opportunistically invest in a broad, global basket of other fixed income asset classes.

## Typical Trading Activity

Three to eight times per year. However, this number can increase or decrease due to the algorithm set and underlying data therein.

## Intent

Seeks to outperform the total return of the Barclays Aggregate Bond Index with a similar risk profile.

## Holdings

A diversified basket of bonds, low-beta equities (such as preferred stocks), and other investments.

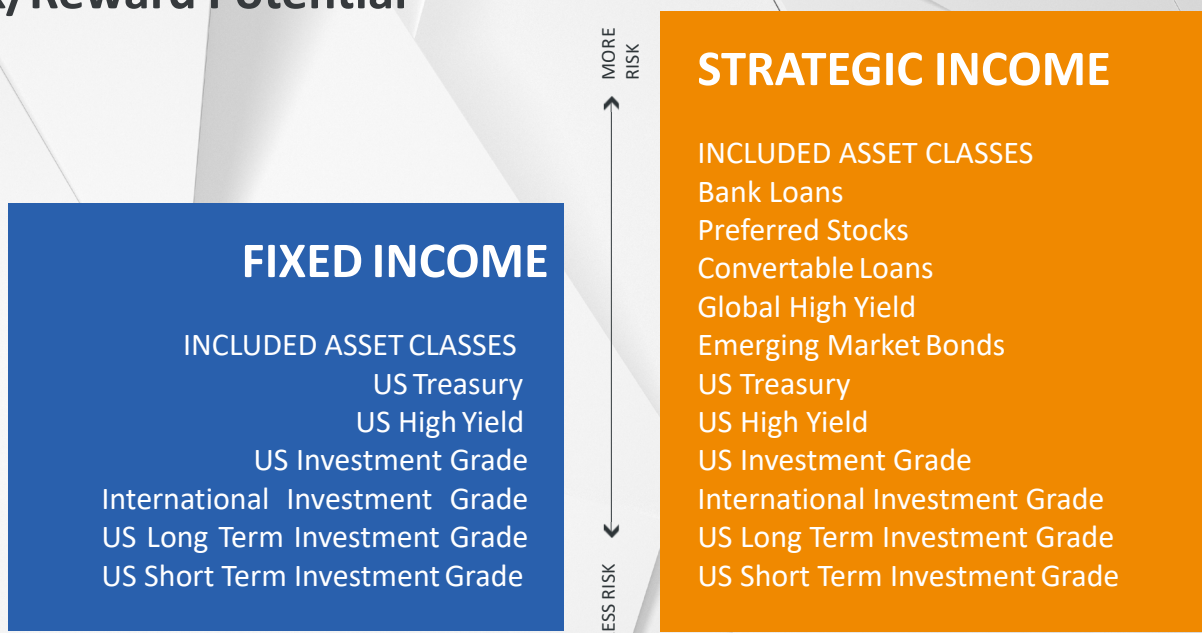
## Risks

Benchmark variance: both strategies may own holdings not included in the benchmark.

## Algorithms

Short term fixed income risk indicators such as duration, credit, and others unique to each fixed income asset class.

## Risk/Reward Potential



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## Important Disclosures

This brochure is solely for informational purposes. Investing involves risk and possible loss of principal capital.

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