

PI FINANCIAL
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Investing with Success – Market Rotation Strategy

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As a full service wealth management firm, we provide our clients independent advice and access to a wide range of investment options. These include blue chip equities, fixed income securities, mutual funds, ETFs, annuities, alternative investments and venture financings.

A Closer Look

Whether you own managed investments such as mutual funds, ETFs, or have a managed account, it may be time to take a closer look at the performance of your investment portfolio.

According to Standard & Poor's Ratings Services, only 27% of active money managers outperformed the TSX Index on a one year basis and only 8% outperformed the TSX Index on a three year basis.

Market Rotation Strategy

For the Market Rotation Strategy we sort and analyse the performance of broad equity and fixed income indices (using exchange traded funds). Updated weekly, this strategy seeks to outperform by investing in the Index ETF that has indicated the strongest relative performance.

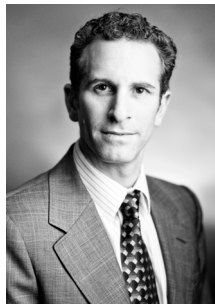
To help us manage our market rotation strategy we use a proprietary software tool for an advanced analysis technique called Fingerprint Analysis.

Fingerprint Analysis

Fingerprint diagrams are simple to understand performance maps that are used to assist in the early detection of changes in relative performance. Using Fingerprint Analysis we actively monitor and manage our client portfolios to ensure that each investment continues to qualify as a top pick for our Market Rotation Strategy.

This strategy and ETFs may incur investment losses and therefore may not be suitable for all investors.

CALL OR EMAIL TODAY TO LEARN MORE ABOUT THE MARKET ROTATION STRATEGY



Stav Adler is an investment advisor and associate portfolio manager with specialization in quantitative investment management, and pre-retirement and retirement planning. He is a Chartered Investment Manager (CIM), Certified International Wealth Manager (CIWM), Fellow of the Canadian Securities Institute (FCSI), and Certified Professional Consultant on Aging (CPCA). Stav is also licensed as a Life, Accident & Sickness agent with PI Financial Services Corp.

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