

Asset Allocation Model

Build a complete asset allocation strategy that aggregates and centralizes competing ideas into an objective framework. Avoid risk by removing the emotion and inconsistency that often derails sound strategies. Specifications Include:

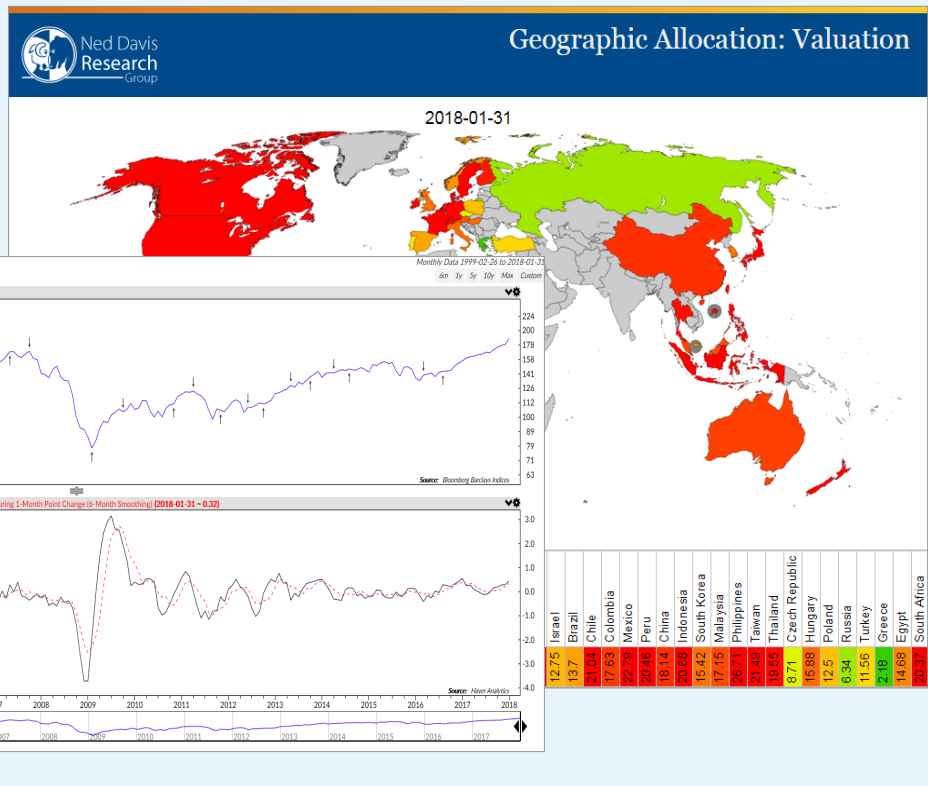
- ❖ 7 Asset Classes
- ❖ NDR Factors and limited custom factors
- ❖ Small-Medium Universe
- ❖ Complexity of output

Global Balanced Account Model Weights					
Asset	Month-End Readings			Chart Link	Chart Info
	2018-01-31	2017-12-29	2017-11-30		
Equity %	71.5	64.4	64.4	H100	ⓘ
Bonds %	16.4	30.0	31.8		
Cash %	12.1	5.6	3.8		

Model Readings						
Model	Intra-Month Reading	Month-End Readings			Chart Link	Chart Info
		2018-01-31	2017-12-29	2017-11-30		
Stock/Bond Composite	63.3	73.3	63.3	63.3	H105	ⓘ
Bond/Cash Composite	40.0	40.0	70.0	78.3	H106	ⓘ

Sub-Model Readings						
Model	Intra-Month Reading	Month-End Readings			Chart Link	Chart Info
		2018-01-31	2017-12-29	2017-11-30		
Stock/Bond Internal Composite	60.0	80.0	60.0	60.0	H101	ⓘ
Stock/Bond External Composite	66.7	66.7	66.7	66.7	H102	ⓘ
Bond/Cash Internal Composite	30.0	30.0	90.0	90.0	H103	ⓘ
Bond/Cash External Composite	50.0	50.0	50.0	66.7	H104	ⓘ

Stock/Bond Internal Factors						
Indicator	Intra-Month Reading	Month-End Readings			Chart Link	Chart Info
		2018-01-31	2017-12-29	2017-11-30		
Global Stock Price 5-Day Momentum	↑	↑	↑	↑	H110	ⓘ
Percent of MSCI ACWI Markets Above 50-Day Moving Average	↑	↑	↑	↓	H111	ⓘ
Stock Price Overbought/Oversold Indicator	↑	↑	↑	↑	H112	ⓘ



FOR MORE INFORMATION

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