TRENDRATING

INVESTMENT DISCIPLINE THAT OUTPERFORMS

Superior Performance
Comes from the Ability
to be in Sync
with Major Price Trends

www.trendrating.com

Trendrating
History

Our CEO, Rocco Pellegrinelli began his career
as a portfolio manager.
He has been a successful entrepreneur
in the technology sector for the past 25 years.
He created Brainpower in 1996 and as Chairman
and CEO, established it as one of the top portfolio
analytics systems. A proven visionary
with extensive experience in model building,
Rocco realized our industry is in dire need
of easier and more practical ways for portfolio
managers to leverage the Momentum Factor
without dramatically changing their work flow.

Most financial data elements are measureable
and factored into the decision making process.
But upon closer review, there has been no widely
acceptable way to measure Momentum.
Our CTO, Sandro Bottarelli is an expert in physics
and engineering. He was formerly Chief Development
Officer at Brainpower.
The analytics and models that he and Rocco
developed became the core of Bloomberg's Portfolio
Analytics offering. While at Bloomberg,
he managed their Portfolio Analytics R&D division.
He and his team work tirelessly to keep innovating
what we believe is the best Momentum Factor Model
in the world.

BOSTON   LONDON   LUGANO

Trendrating's IP and technology represents over 20 man
years of effort started by our CEO, CTO and their colleagues
in Lugano, Switzerland. The company was launched in 2013
after four years of research and development.
Trendrating currently services over 100 portfolio managers globally.
Our team has deep domain expertise in software development
and financial modeling. In early 2016, FTSE Russell selected
Trendrating to collaborate with on a series
of Global Momentum Indices. This validation is testament
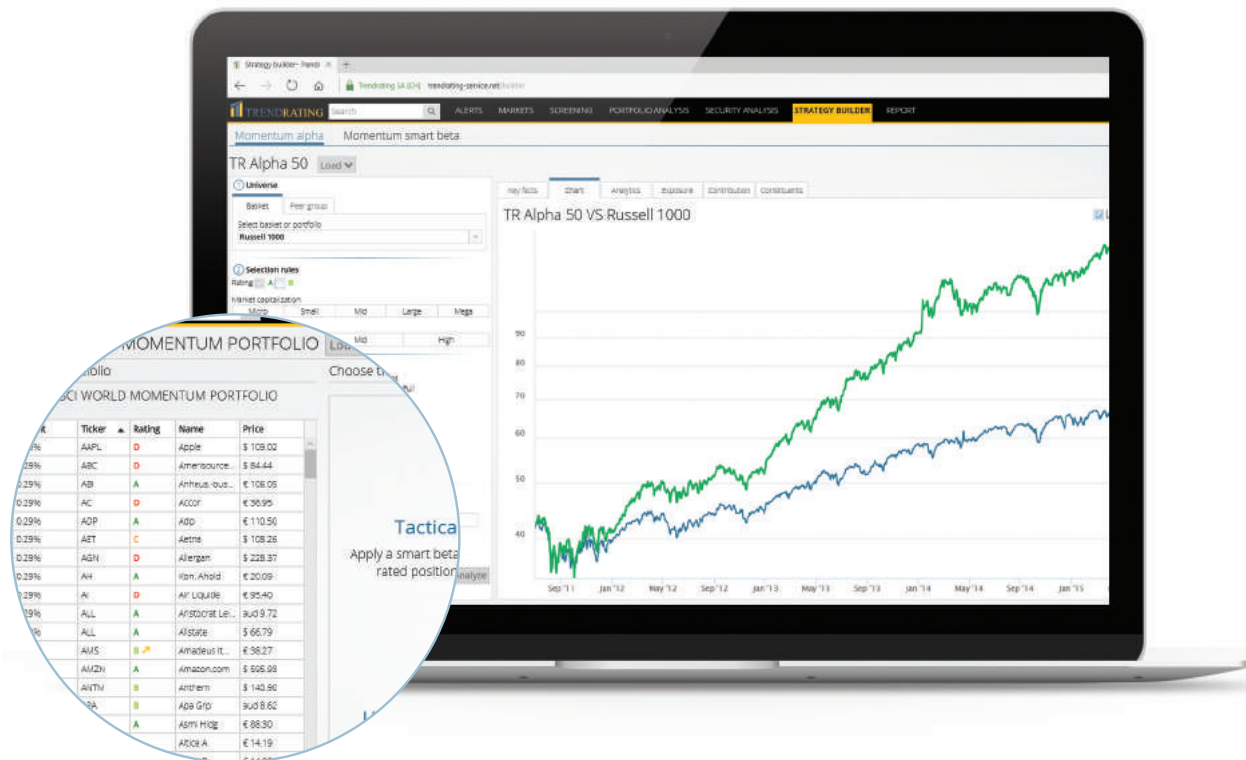to the quality and accuracy of our ratings.

FTSE Russell

In 2006, Bloomberg purchased Brainpower, a portfolio analytics company
founded by Rocco Pellegrinelli.
Brainpower had built a search engine for structured equity data.

*"We said, that's exactly what we would build, it's brilliant so we bought them.
I love companies that build, that are brilliant."*

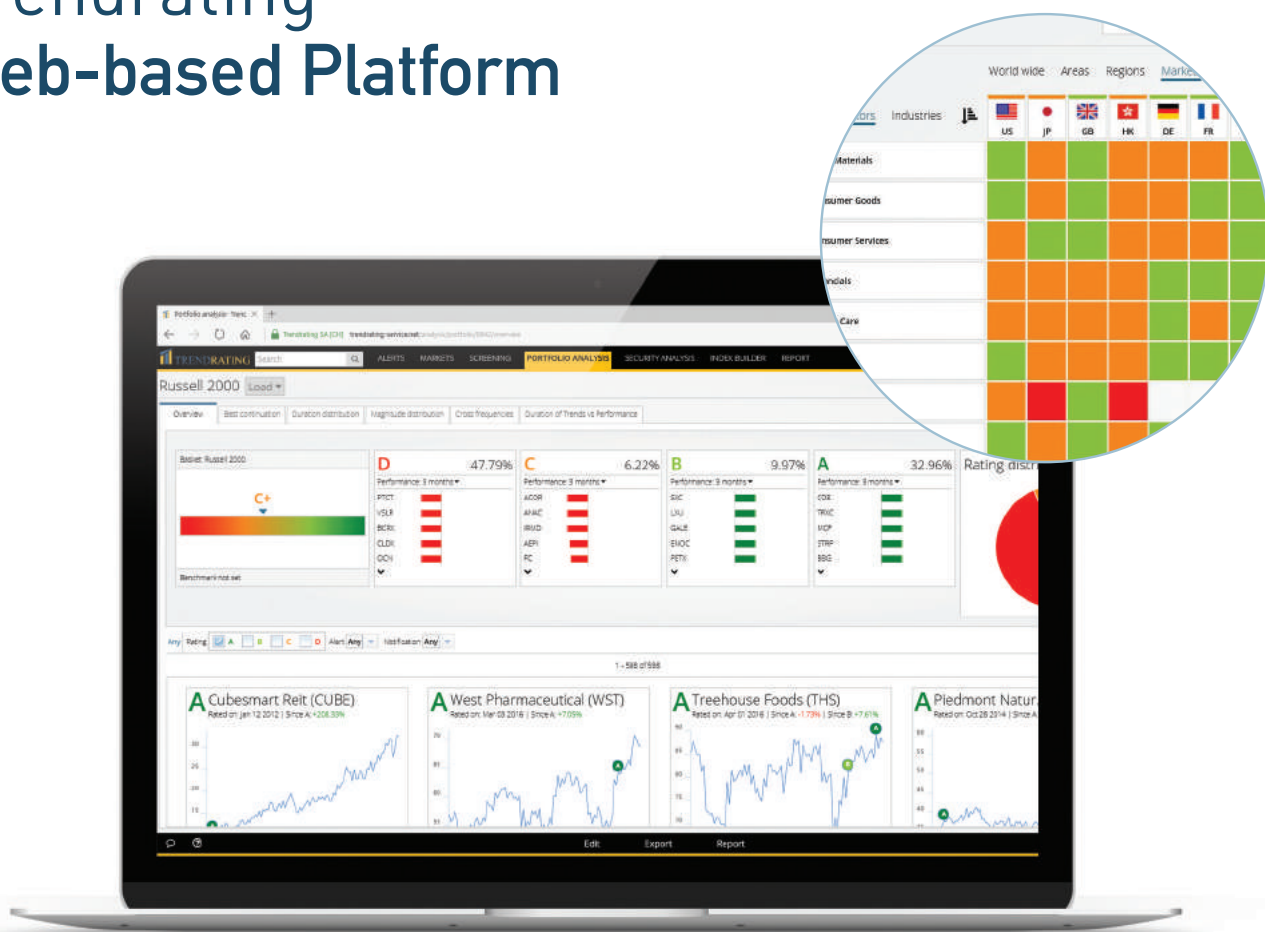*Tom Secunda, Co-Founder of Bloomberg*

Trendrating
Approach & Value Proposition

How does Trendrating enhance my existing investment process?

- Capturing a large part of bull trends and avoiding most of the bear trends in individual stocks, ETFs and sectors over different market cycles is the essence of successful investing.

- Trendrating provides proven, intelligent analytics and solutions to maximize trend capture across markets and securities.
  The positive impact on returns and long term performance is fully transparent and measurable.

- Our customers use our rating grades (A,B,C,D) and underlying numeric scores to complement their investment decision process which enhances returns and reduces risk.

- Analyze individual stocks and sectors to validate ideas and spot opportunities.
  Rate your portfolio exposure to positive vs. negative trends and rebalance the exposure for maximum performance.

- Rate the performance of mutual funds to assess the manager's skill to identify trends using our unique Trend Capture Rating (TCR).

- Our models are designed to self-adjust to market conditions and use adaptive time windows to spot trends sooner than other static models.

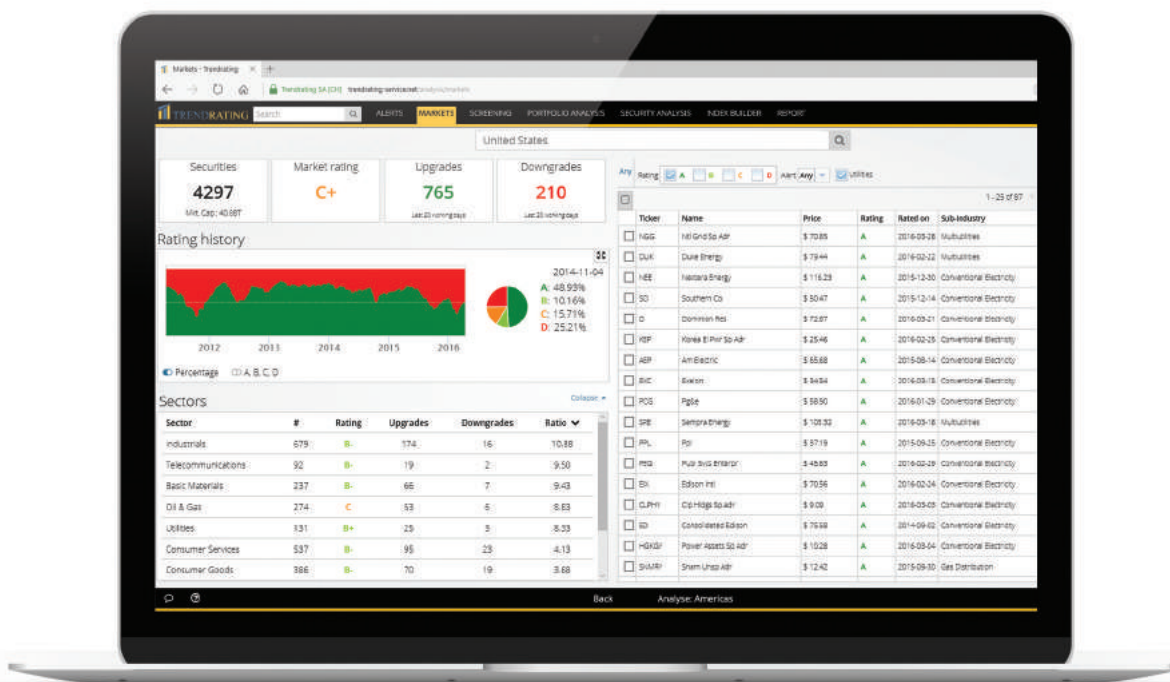# Trendrating
Web-based Platform

The software is comprised
of easy-to-use interconnected modules:

▸ **Alerts**

Let's you stay on top of Trend Capture changes to securities
in your portfolio, baskets, ETFs and Indices.

▸ **Markets Analyzer**

Calculate the weighted Trend Capture rating by region, country, sector & industry
for smarter selection and allocation.

▸ **Portfolio Analyzer**

Leverage our Trend Capture Model to run regular health checks on your portfolio
and maximize profits while reducing risks.

▸ **Portfolio Optimizer**

Run custom built Trend Capture strategies against your portfolio
for optimal tactical allocation.

*"I use it every day, I enter client portfolios
and get daily updates on them.
I always look at how a stock is ranked before buying it."*

- Morgan Stanley, Financial Advisor -

*"The constant addition of new features
is remarkable, especially the ETF asset class screener.
It's helping me save time when setting my asset
allocations in the portfolio building process."*

- UBS Wealth Manager -

‣ **Screener**

Find the best momentum plays across single securities, countries,
sectors and markets.

‣ **Security Analyzer**

Enables you to drill down into individual securities to gauge trend Duration,
Magnitude and Upside Potential, as well as how a security compares to its peers.

‣ **Strategy Builder**

Gives you the power to easily design and test complex momentum alpha
and smart beta strategies that leverage all of Trendrating's advanced algorithms.

‣ **Excel Add-in**

Export all ratings data to your existing spreadsheets to rank stocks and ETFs
by Smart Momentum, % Capture or Avoidance, Retracement, etc. for better selection.

LONDON
Octagon Point - 5 Cheapside
London, EC2V 6AA
United Kingdom
Phone: +44 (20) 3828 2215
Email: info@trendrating.net

BOSTON
60 State Street
Suite 773
Boston, MA 02109
Phone: +1 508 315 6313
Email: info@trendrating.com

LUGANO
Via Cantonale 19
Lugano, CH-6900
Switzerland
Phone: +41 91 91 06 590
Email: info@trendrating.net