

## Overview

Dynamic global asset allocation strategies that are designed to deliver target returns to investors at defined destinations. The strategies tactically position in domestic and international equity and fixed-income ETF's including US sectors, developed and emerging market countries, and bonds.

## Investment Objective

Maximize the probability of achieving the given target return within the stated investment destinations.

Destination Number	Destination (Years)	Target Net Return (Max. expense 1.5%)
2	7.5	4%
3	12.5	5%
4	17.5	6%
5	22.5	7%

## Facts

### Inception Date:

05/15/2019

### Portfolio Manager:

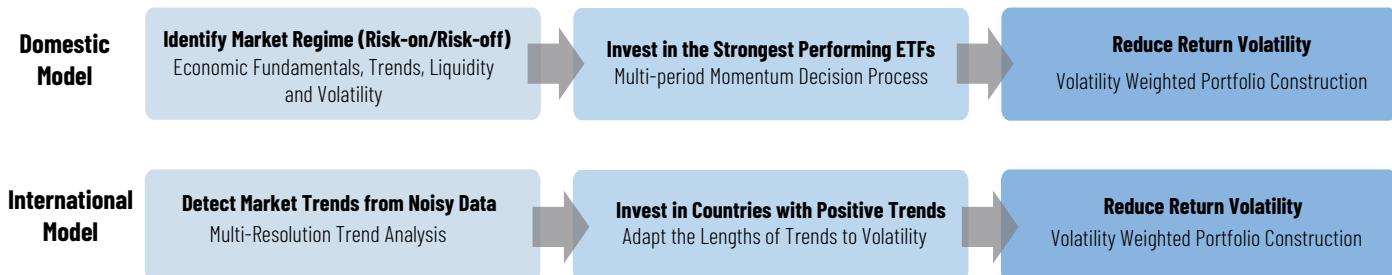
Henry Ma, Ph. D., CFA

## Benefits of Strategies

- Well-defined target returns at destinations
- Limit losses during market downturns
- Exposure to domestic and international markets
- Multi-strategy approach reduces model risk

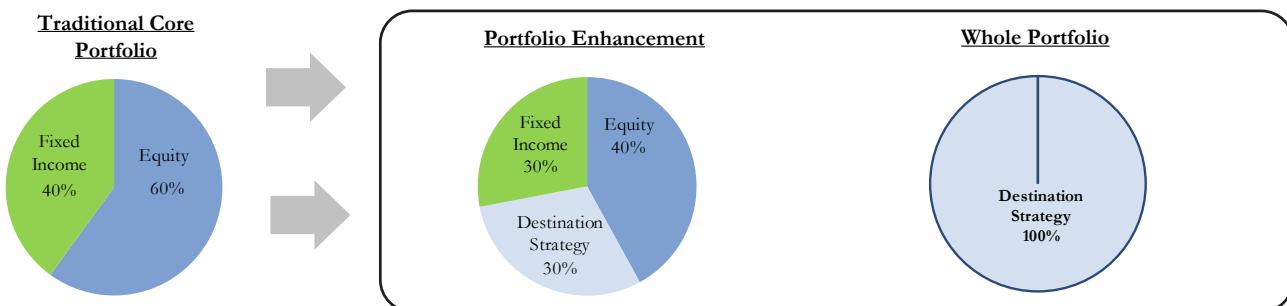
## Process

Julex utilizes a trend-following model to determine its positioning internationally, and an adaptive economic model to determine its positioning domestically. 40% of the strategy uses the international model, and the remaining 60% uses the domestic model. The strategy trades twice a month, and holds between 4 and 20 positions at a time.



## How to Use the Destination Strategies

The Destination Strategies can either be added as a portfolio enhancement or act as an all-encompassing portfolio solution.



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