



Drops and Recovery

Many global asset classes in the twentieth century produced spectacular gains for individuals, but those assets also went through regular and painful losses such as those in 2008 during the financial crisis and in 2020 due to Covid. All the G-7 countries have experienced at least one period where stocks lost 75% of their value.*

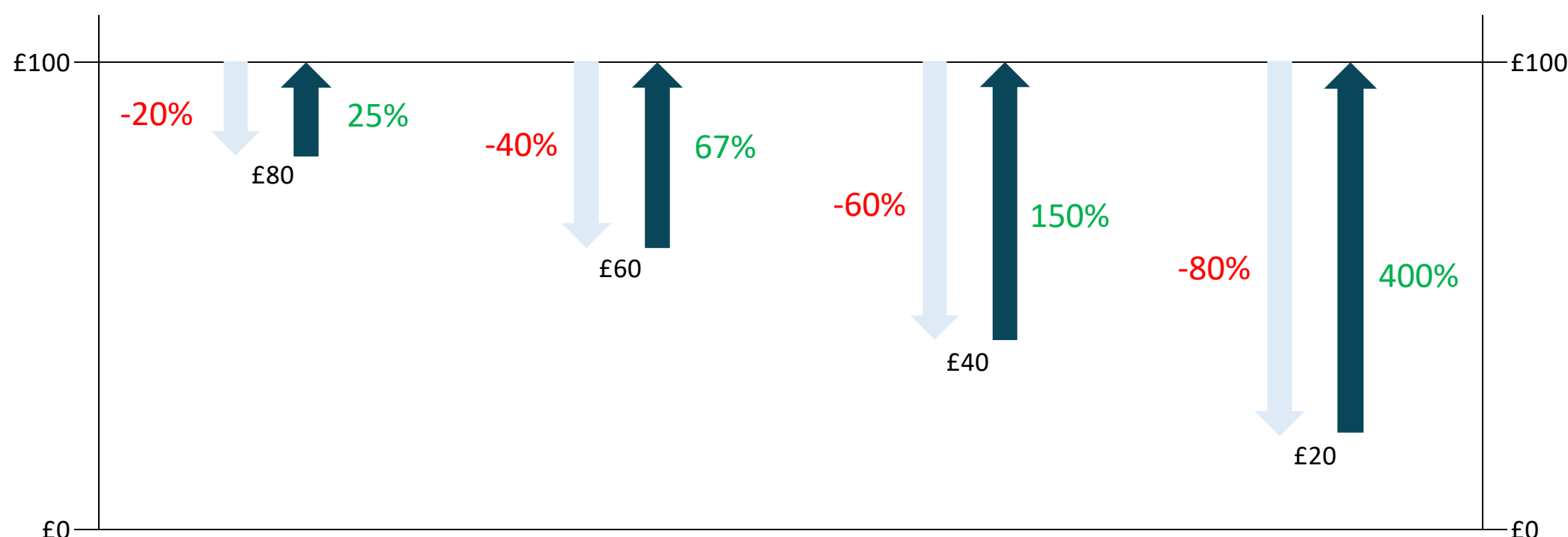
Law of Percentages

A fall of 10% in the value of a portfolio would require an 11% gain to get back to its original value.







But the as the percentage of loss increases, the growth required to break even increases drastically.

For example, a 20% loss of a £200,000 portfolio would require a gain of 25% to break even again at £200,000.

If there is a reduction of 80%, the value of the portfolio would have to quadruple (grow by 400%) in order to break even.



Trend Following

-  Our advanced trend following algorithms monitor and signal when to buy, hold or sell capital assets.
-  This allows us to participate in up markets and reduce exposure to down markets providing consistent returns at lower risk and lower cost.
-  Our dynamic, technical rules-based analysis actively informs us when to hold equities and when to revert to the security of safer investments.
-  This process responds to evolving stock market conditions with each geographic equity sector monitored independently.
-  Trend-following strategies have been shown to significantly reduce volatility and maximum drawdowns, while providing consistent capital returns.
-  Our unique algorithm represents the best in modern investment philosophy and delivers on cost, accessibility and performance.

*Faber, M. T. (2007). A Quantitative Approach to Tactical Asset Allocation. *The Journal of Wealth Management*, 9(4), 69-79