



# Trade Rationale

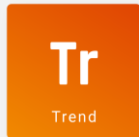
JANUARY MIDMONTH 2023

# Trend Level Element

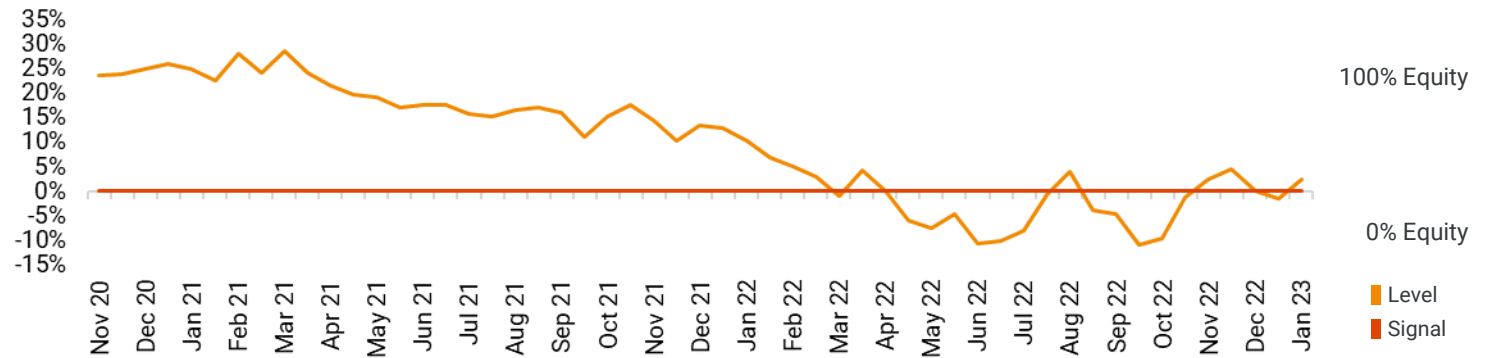


## TRADE RATIONALE

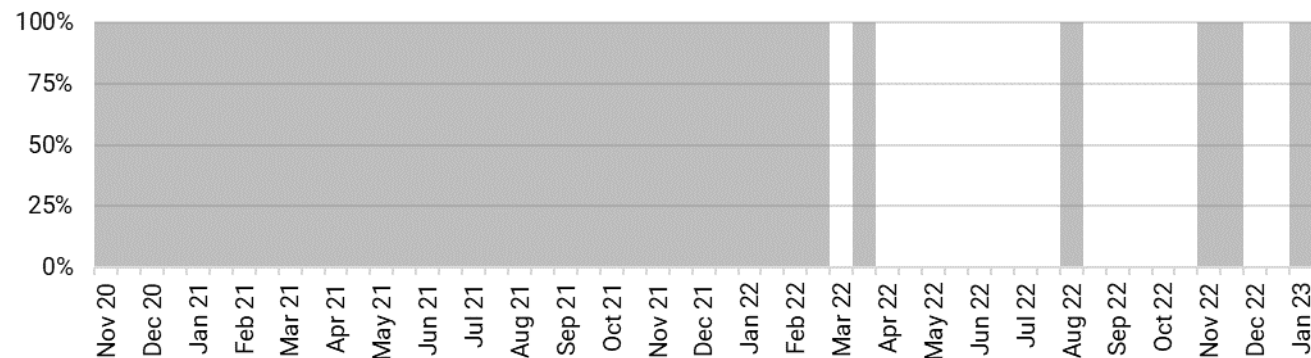
The Trend Element will move to full equity exposure. Over the last few months, we've seen a multitude of changes in market momentum. This last two-week period was no different. With the continued slowdown in inflation data, equity markets have recovered enough to create a positive trend on expectations the Federal Reserve will communicate a slower interest rate policy in the upcoming meeting.



## SIGNAL



## HISTORICAL EXPOSURE



Source: Helios Quantitative Research, Bloomberg

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# Contrarian Level Element

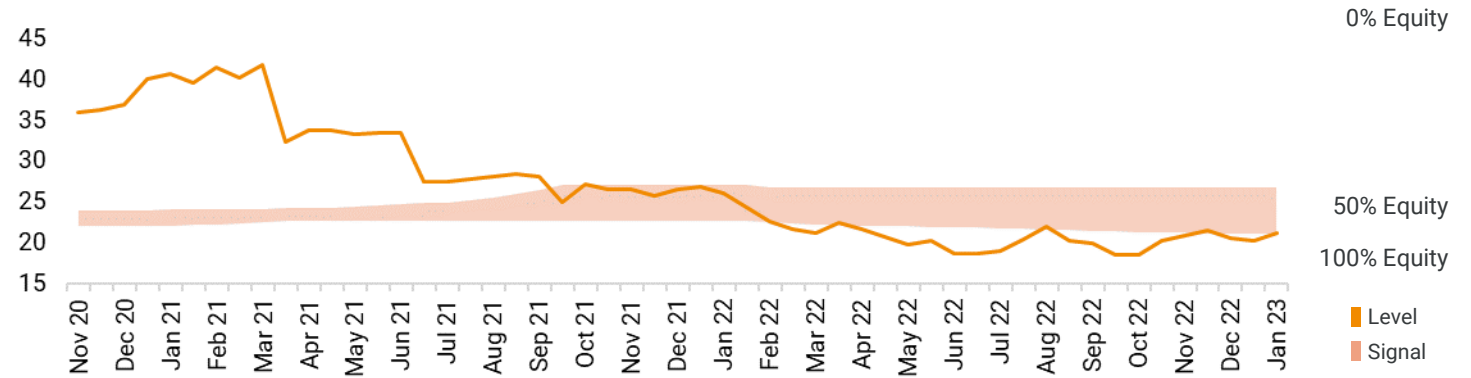


## TRADE RATIONALE

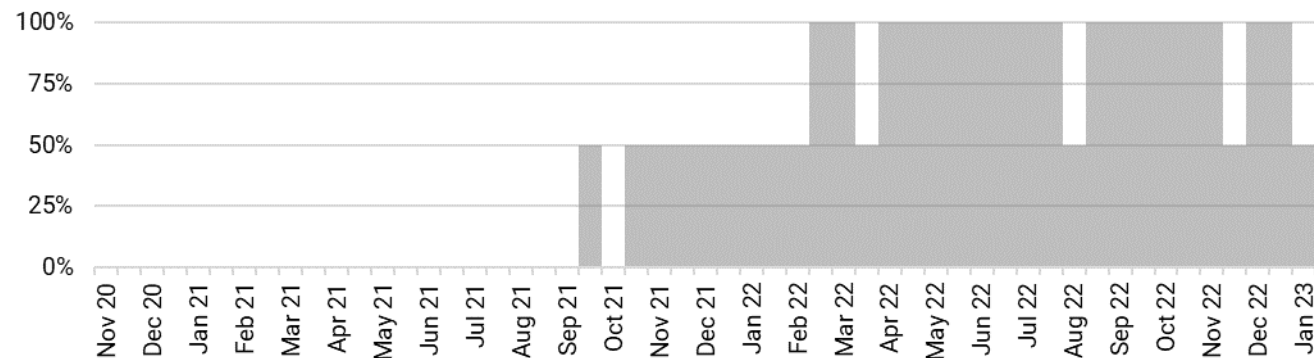
The Contrarian Element will move to 50% equity exposure (neutral). As markets have regained some lost value due to expectations the Federal Reserve may slow interest rate hikes, contrarian-minded investors have seen a decline in fundamentals, including Price-to-Earnings ratios. The Element will position itself in 50% bonds, which may be attractive if the market expectations of interest rates come to fruition.



## SIGNAL



## HISTORICAL EXPOSURE



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# Model Changes



## Revo Turnkey

Increased equity allocation primarily in large cap/mid cap and decreased fixed income allocation in response to improved market sentiment, consecutive improvements in inflation numbers, and the potential for reduced interest rate hikes from the Fed.

## Revo Blend

Increased equity allocation primarily in large cap/mid cap and decreased fixed income allocation in response to improved market sentiment, consecutive improvements in inflation numbers, and the potential for reduced interest rate hikes from the Fed.

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# Definitions & Disclosures

METHODS, DEFINITIONS, AND MORE

# Definitions & Disclosures

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