



Trade Rationale

NOVEMBER MID-MONTH 2024

Volatility Level Element

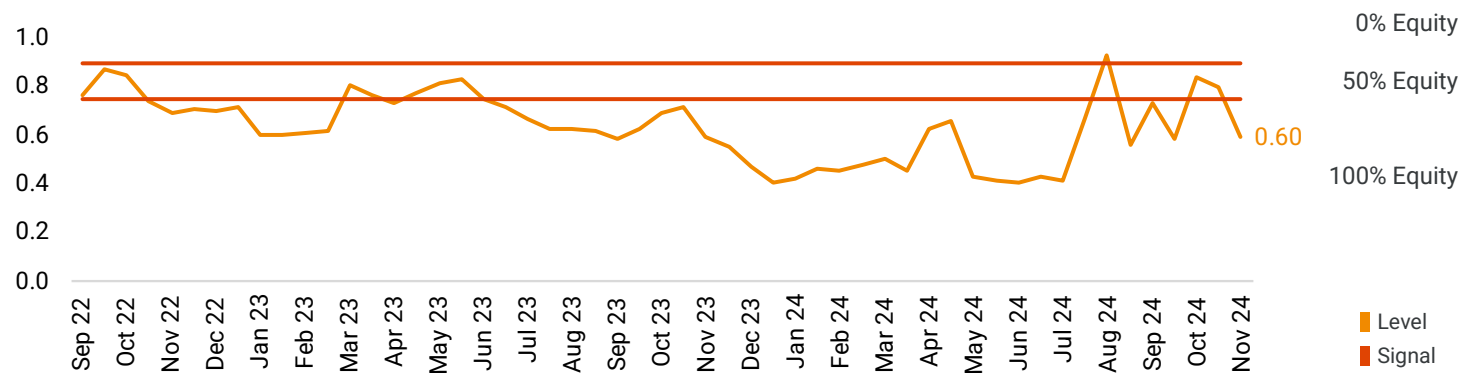


TRADE RATIONALE

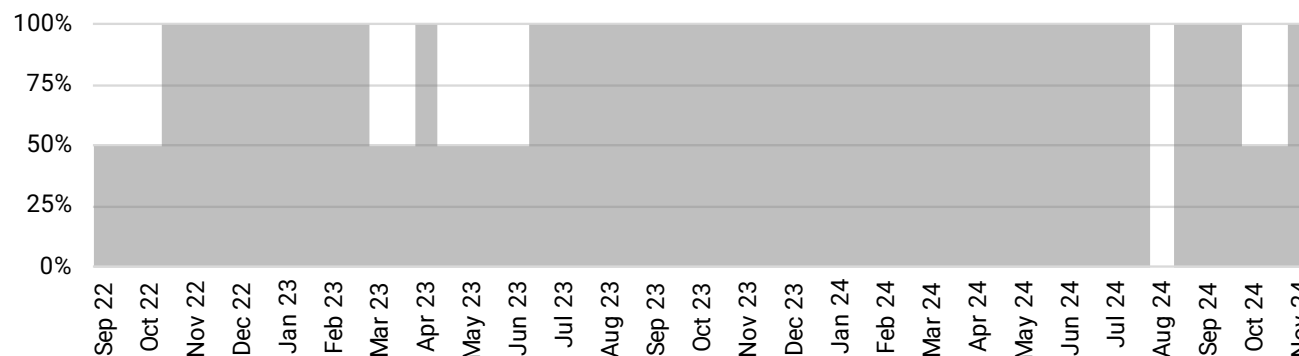
Our expectations for short-term market volatility have lowered, creating a positive view of equity markets. If equity markets hate one thing, it's uncertainty - and Presidential Elections can create a lot of it. Leading up to an election, it's normal to see expectations of volatility rise as investors shy away from taking positions until they have more information. In the days following an election it's also common to see volatility expectations soften as investors assess the results and make investments aligned with their assessments. With the election behind us, we continue to monitor The Fed, inflation, jobs, and other important economic data that may create excess risk over the rest of 2024. The latest data those categories have come in at or near expectations, which is a positive sign over the short-term.



SIGNAL



HISTORICAL EXPOSURE



Source: Helios Quantitative Research, Bloomberg

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Model Changes



Revo Turnkey

No changes.

Revo Blend & Spectrum

Slightly decrease fixed income holdings across the board and rotate to increase equity exposure primarily in Large Cap Blend and certain existing market sectors.

Source: Helios Quantitative Research, Bloomberg

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METHODS, DEFINITIONS, AND MORE

Definitions & Disclosures

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