



Trade Rationale

APRIL MID-MONTH 2026

Trend Level Element

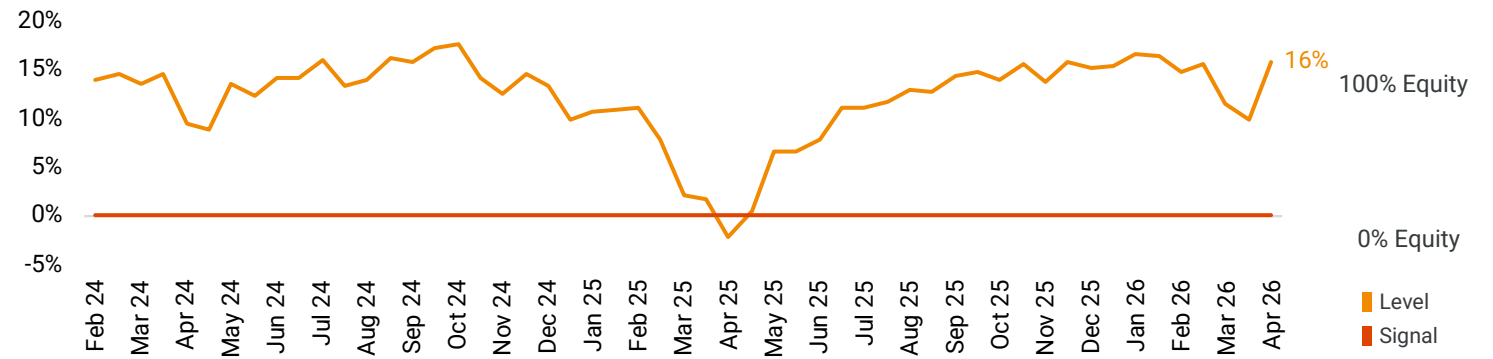


TRADE RATIONALE

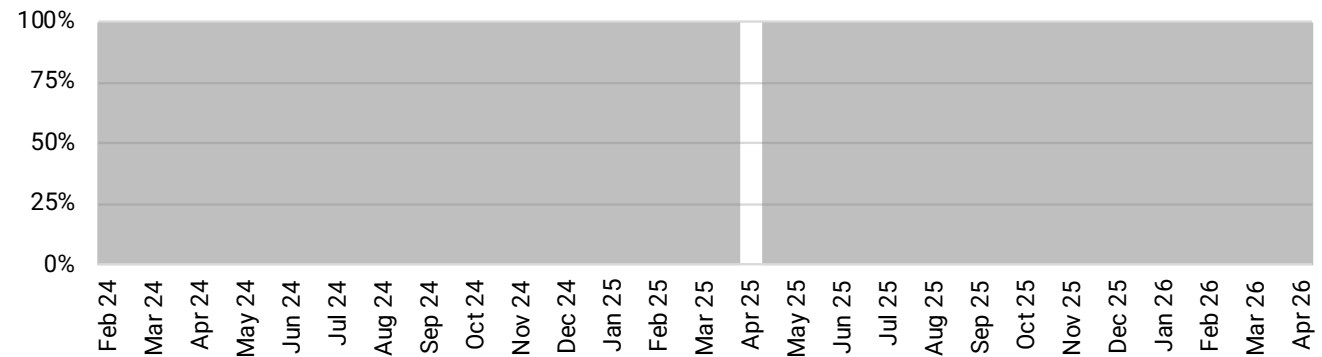
No changes.



SIGNAL



HISTORICAL EXPOSURE



Source: Helios Quantitative Research, Bloomberg

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Volatility Level Element



TRADE RATIONALE

The Volatility Element has increased equity exposure from 0% to 100% as market conditions have transitioned toward a lower-volatility environment with strong conviction. **Over the past two weeks, implied volatility has dropped sharply from 25.2 to the upper teens, below the transitional regime average of 19.7, driven primarily by the announcement of a U.S.–Iran ceasefire,** which eased geopolitical tensions and pushed oil prices down from peaks above \$112 per barrel. Credit conditions remain tighter than the transitional average, although high-yield spreads have widened modestly and now sit below long-term norms. Investor sentiment has turned broadly constructive as markets have recovered toward pre-conflict levels. The element identifies that the market is in a transitional volatility regime and has increased equity allocations to 100%.

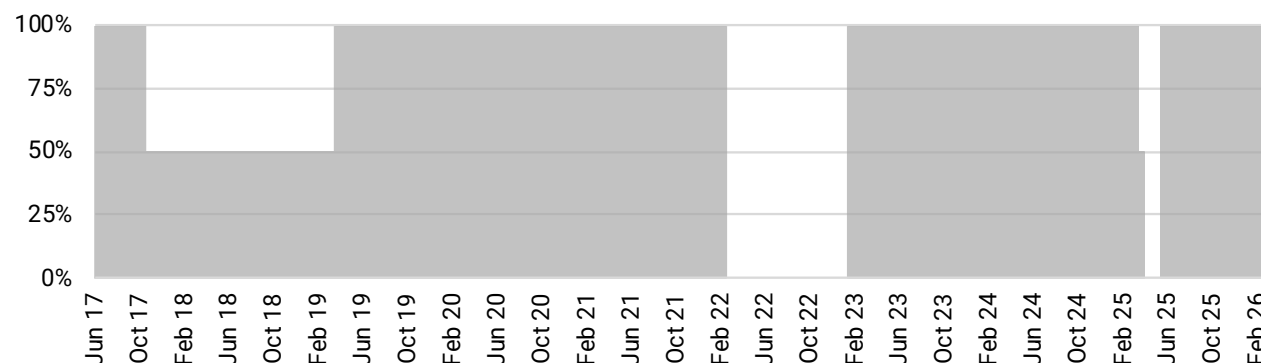
ALLOCATION GRID

	Low Volatility	Transitional Volatility	High Volatility	
Expected Persistence Adds Risk			▲	0% Equity
Expected Persistence Maintains Risk				50% Equity
Expected Persistence Reduces Risk		●		100% Equity

Previous ▲

Current ●

HISTORICAL EXPOSURE



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Model Changes



Revo Turnkey

No changes.

Revo Blend

Equity: Increased Lg Cap Blend, Lg Cap Equal Weight, Energy, Utilities, and Lg Cap High Dividend.

** In addition to the above equity changes, Aggressive & Conservative Blend reduced Lg Cap Blend to increase Mid Cap Growth, UK, Int'l Dev Low Volatility, Brazil, and Taiwan in alignment with other Revo Blends.

Fixed Income: Reduced US ST Agg, US Treasury, Agency, US Corp, and EM Bond.

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METHODS, DEFINITIONS, AND MORE

Definitions & Disclosures

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