Example Content

Our Portfolios

Conservative • Moderately Conservative • Moderate • Moderately Aggressive • Aggressive

Portfolio Suggestions

Portfolio Narrative

Performance in Realtime

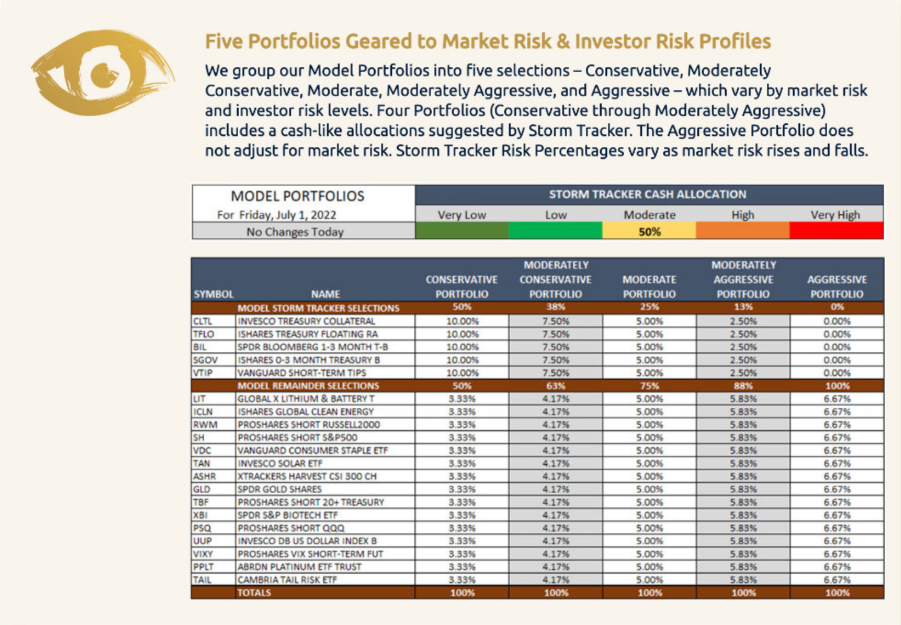
Storm Tracker Allocations

Portfolio Allocations

Methodologies & Disclosures

WEEK OF JUNE 27, 2022

Daily Model Portfolios



Five Portfolios Geared to Market Risk & Investor Risk Profiles

We group our Model Portfolios into five selections – Conservative, Moderately Conservative, Moderate, Moderately Aggressive, and Aggressive – which vary by market risk and investor risk levels. Four Portfolios (Conservative through Moderately Aggressive) includes a cash-like allocations suggested by Storm Tracker. The Aggressive Portfolio does not adjust for market risk. Storm Tracker Risk Percentages vary as market risk rises and falls.

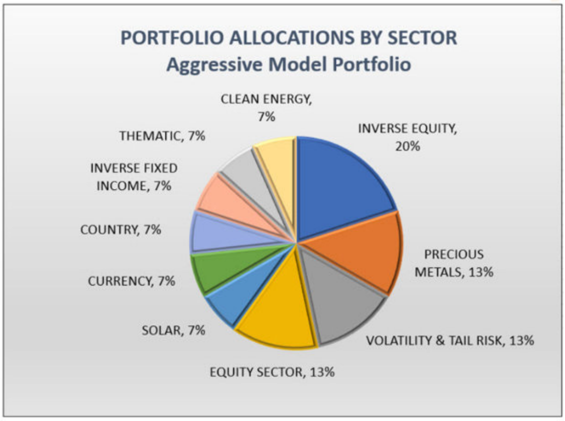
MODEL PORTFOLIOS	STORM TRACKER CASH ALLOCATION				
For Friday, July 1, 2022	Very Low	Low	Moderate	High	Very High
No Changes Today	🟩	🟩	50%	🟧	🟥

SYMBOL	NAME	CONSERVATIVE PORTFOLIO	MODERATELY CONSERVATIVE PORTFOLIO	MODERATE PORTFOLIO	MODERATELY AGGRESSIVE PORTFOLIO	AGGRESSIVE PORTFOLIO
	MODEL STORM TRACKER SELECTIONS	50%	38%	25%	13%	0%
CLTL	INVESCO TREASURY COLLATERAL	10.00%	7.50%	5.00%	2.50%	0.00%
TFLO	ISHARES TREASURY FLOATING RA	10.00%	7.50%	5.00%	2.50%	0.00%
BIL	SPDR BLOOMBERG 1-3 MONTH T-B	10.00%	7.50%	5.00%	2.50%	0.00%
SGOV	ISHARES 0-3 MONTH TREASURY B	10.00%	7.50%	5.00%	2.50%	0.00%
VTIP	VANGUARD SHORT-TERM TIPS	10.00%	7.50%	5.00%	2.50%	0.00%
	MODEL REMAINDER SELECTIONS	50%	63%	75%	88%	100%
LIT	GLOBAL X LITHIUM & BATTERY T	3.33%	4.17%	5.00%	5.83%	6.67%
ICLN	ISHARES GLOBAL CLEAN ENERGY	3.33%	4.17%	5.00%	5.83%	6.67%
RWM	PROSHARES SHORT RUSSELL2000	3.33%	4.17%	5.00%	5.83%	6.67%
SH	PROSHARES SHORT S&P500	3.33%	4.17%	5.00%	5.83%	6.67%
VDC	VANGUARD CONSUMER STAPLE ETF	3.33%	4.17%	5.00%	5.83%	6.67%
TAN	INVESCO SOLAR ETF	3.33%	4.17%	5.00%	5.83%	6.67%
ASHR	XTRACKERS HARVEST CSI 300 CH	3.33%	4.17%	5.00%	5.83%	6.67%
GLD	SPDR GOLD SHARES	3.33%	4.17%	5.00%	5.83%	6.67%
TBF	PROSHARES SHORT 20+ TREASURY	3.33%	4.17%	5.00%	5.83%	6.67%
XBI	SPDR S&P BIOTECH ETF	3.33%	4.17%	5.00%	5.83%	6.67%
PSQ	PROSHARES SHORT QQQ	3.33%	4.17%	5.00%	5.83%	6.67%
UUP	INVESCO DB US DOLLAR INDEX B	3.33%	4.17%	5.00%	5.83%	6.67%
VIXY	PROSHARES VIX SHORT-TERM FUT	3.33%	4.17%	5.00%	5.83%	6.67%
PPLT	ABRDN PLATINUM ETF TRUST	3.33%	4.17%	5.00%	5.83%	6.67%
TAIL	CAMBRIA TAIL RISK ETF	3.33%	4.17%	5.00%	5.83%	6.67%
	TOTALS	100%	100%	100%	100%	100%

Daily Portfolio Allocations

Portfolio Narrative

Please see our reformed nomenclature for Storm Tracker Risk Levels, described on the Dashboard, that now run from Very Low, to Low, to Moderate, to High, and to Very High. With five categories of risk (rather than 100 categories heretofore from 0%-100%), rebalancing across Portfolio Allocations week-to-week on account of changes in Strom Tracker have been massively contained. While we often speak to market bubbles and a recession to come, Storm Tracker tells us that the current rally still has respect among investors. Current Portfolio Allocations appear below by sector.



Realtime Performance

CURRENT PORTFOLIO SELECTIONS

Performance Today, This Week & Trailing 5-Day

Current performance for Portfolio Allocations is displayed below in near-real-time for today, this week-to-date, and back 5-days, based upon prior closing prices for afterhours quotations, so you can monitor current performance when landing on this page. Performance is refreshed each time you refresh your browser, or leave and return to this page.

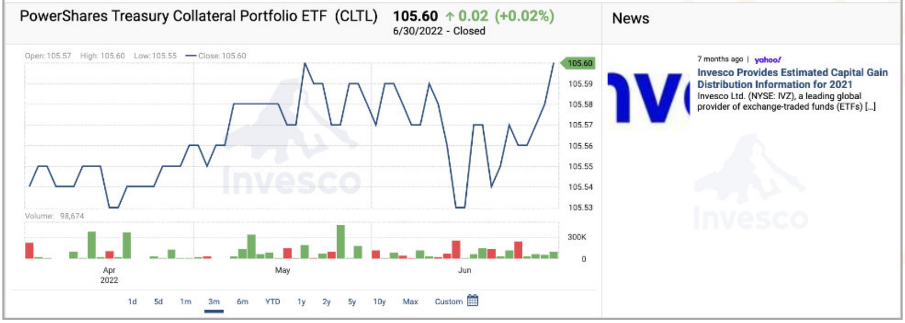
Symbol	Name	Last Price	Today	This Week	5-Day
CLTL	PowerShares Treasury Collateral Portfolio ETF	$105.60	+0.02%	+0.04%	+0.03%
TFLO	iShares Trust	$50.40	-0.02%	-0.02%	-0.02%
BIL	SPDR Lehman 1-3 Month T Bill (ETF)	$91.49	+0.01%	+0.04%	+0.02%
SGOV	iShares 0-3 Month Treasury Bond	$100.12	+0.02%	+0.05%	+0.03%
USFR	WisdomTree Trust	$50.33	0.00%	+0.04%	-0.06%
LIT	Global X Funds	$72.62	+0.06%	-4.20%	-1.47%
ICLN	iShares S&P Global Clean Energy Index Fund	$19.05	+1.71%	-1.85%	-1.40%
RWM	ProShares Short Russell2000(ETF)	$26.04	+0.77%	+3.25%	+0.12%
SH	ProShares Short S&P500 (ETF)	$16.50	+0.92%	+3.51%	+0.18%
VDC	Vanguard Consumer Staples ETF	$185.34	-0.02%	-1.05%	+0.93%
TAN	Guggenheim Solar ETF	$71.39	+2.99%	-3.23%	-2.25%
ASHR	Deutsche X-Trackers Harvest CSI 300 China ...	$34.17	+2.24%	+2.06%	+3.77%
GLD	SPDR Gold Trust (ETF)	$168.46	-0.61%	-0.96%	-1.06%
TBF	ProShares Short 20+ Year Treasury ETF	$20.05	-0.94%	-2.05%	-0.59%
XBI	SPDR S&P Biotech (ETF)	$74.27	-0.71%	-3.62%	-2.57%
PSQ	ProShares Short QQQ (ETF)	$14.40	+1.27%	+5.11%	+1.48%
UUP	PowerShares DB US Dollar Index Bullish	$27.96	-0.32%	+0.65%	+0.43%
VIXY	ProShares Trust II	$18.25	+0.94%	+0.94%	-1.14%
PPLT	ETFS Physical Platinum Shares	$83.10	-2.52%	-1.47%	-1.63%
TAIL	Cambria Tail Risk ETF	$17.58	+1.21%	+3.35%	+0.29%

Equal Weight Composite	+0.35%	+0.03%	-0.25%

Storm Tracker Allocations

PowerShares Treasury Collateral Portfolio ETF (CLTL)

The investment seeks to track the investment results (before fees and expenses) of the ICE U.S. Treasury Short Bond Index. The fund generally will invest at least 80% of its total assets in the components of the index. The index is designed to measure the performance of U.S. Treasury Obligations with a maximum remaining maturity of 12 months. "U.S. Treasury Obligations" refer to securities issued or guaranteed by the U.S. Treasury where the payment of principal and interest is backed by the full faith and credit of the U.S. government. They include U.S. Treasury notes, bills and bonds.



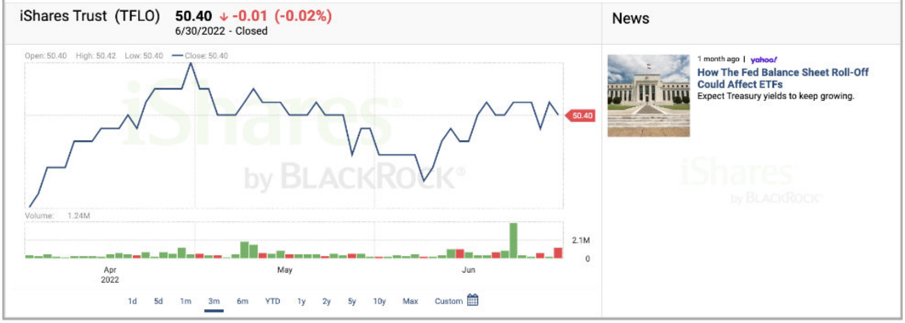
PowerShares Treasury Collateral Portfolio ETF (CLTL) **105.60** ↑ 0.02 (+0.02%)
6/30/2022 - Closed

News

7 months ago | yahoo!
Invesco Provides Estimated Capital Gain Distribution Information for 2021
Invesco Ltd. (NYSE: IVZ), a leading global provider of exchange-traded funds (ETFs) [...]

iShares Trust (TFLO)

The investment seeks to track the investment results of the Bloomberg Barclays U.S. Treasury Floating Rate Index, which is composed of U.S. Treasury floating rate bonds. The fund generally will invest at least 90% of its assets in the component securities of the underlying index and may invest up to 10% of its assets in certain futures, options and swap contracts, cash and cash equivalents. The underlying index is a market capitalization-weighted index that measures the performance of floating rate public obligations of the U.S. Treasury.



iShares Trust (TFLO) **50.40** ↓ -0.01 (-0.02%)
6/30/2022 - Closed

News

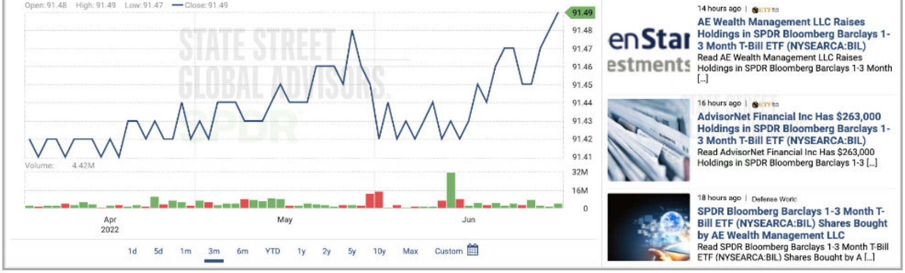
1 month ago | yahoo!
How The Fed Balance Sheet Roll-Off Could Affect ETFs
Expect Treasury yields to keep growing.

SPDR Lehman 1-3 Month T Bill (ETF) (BIL)

The investment seeks to provide investment results that correspond generally to the price and yield performance of the Bloomberg Barclays 1-3 Month U.S. Treasury Bill Index. The fund invests substantially all, but at least 80%, of its total assets in the securities comprising the index and in securities that the Adviser determines have economic characteristics that are substantially identical to the economic characteristics of the securities that comprise the index. The index measures the performance of public obligations of the U.S. Treasury that have a remaining maturity of greater than or equal to 1 month and less than 3 months.

SPDR Lehman 1-3 Month T Bill (ETF) (BIL) **91.49** ↑ 0.01 (+0.01%)
6/30/2022 - Closed

News



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AE Wealth Management LLC Raises Holdings in SPDR Bloomberg Barclays 1-3 Month T-Bill ETF (NYSEARCA:BIL)

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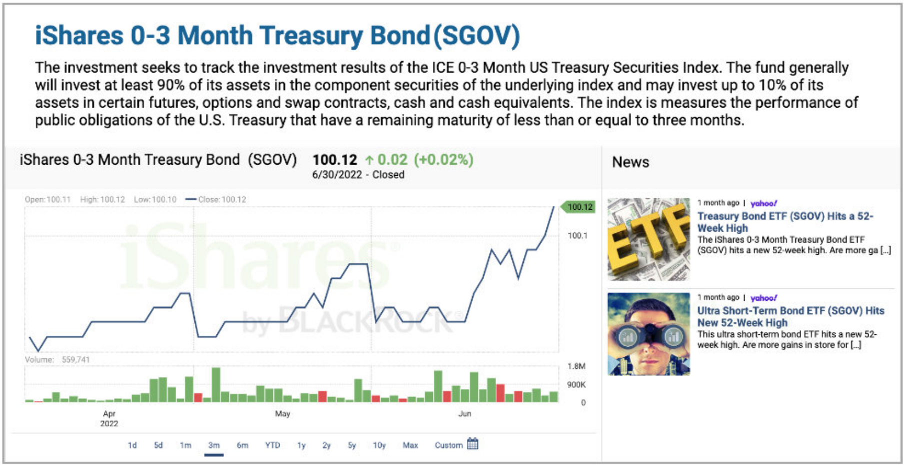

iShares 0-3 Month Treasury Bond(SGOV)

The investment seeks to track the investment results of the ICE 0-3 Month US Treasury Securities Index. The fund generally will invest at least 90% of its assets in the component securities of the underlying index and may invest up to 10% of its assets in certain futures, options and swap contracts, cash and cash equivalents. The index is measures the performance of public obligations of the U.S. Treasury that have a remaining maturity of less than or equal to three months.

iShares 0-3 Month Treasury Bond (SGOV) **100.12** ↑ 0.02 (+0.02%)
6/30/2022 - Closed

News

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Treasury Bond ETF (SGOV) Hits a 52-Week High

The iShares 0-3 Month Treasury Bond ETF (SGOV) hits a new 52-week high. Are more ga […]

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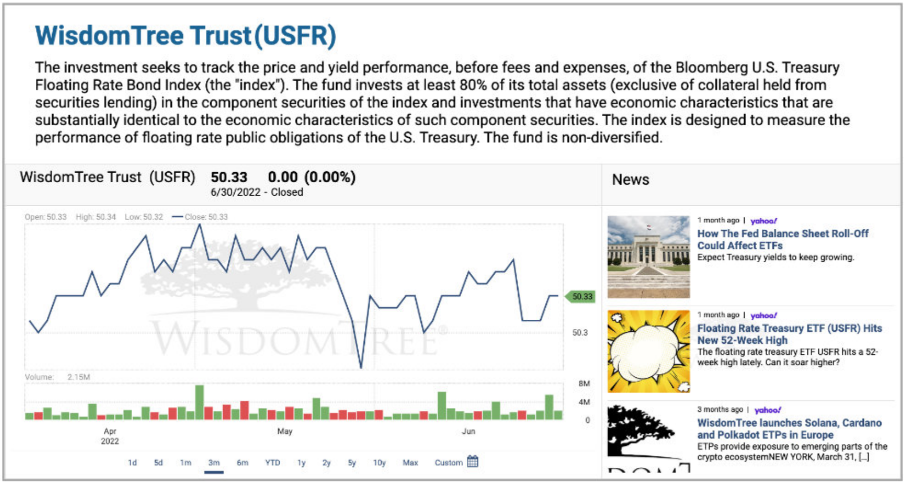
Ultra Short-Term Bond ETF (SGOV) Hits New 52-Week High

This ultra short-term bond ETF hits a new 52-week high. Are more gains in store for […]



WisdomTree Trust(USFR)

The investment seeks to track the price and yield performance, before fees and expenses, of the Bloomberg U.S. Treasury Floating Rate Bond Index (the "index"). The fund invests at least 80% of its total assets (exclusive of collateral held from securities lending) in the component securities of the index and investments that have economic characteristics that are substantially identical to the economic characteristics of such component securities. The index is designed to measure the performance of floating rate public obligations of the U.S. Treasury. The fund is non-diversified.

WisdomTree Trust (USFR) **50.33** **0.00** **(0.00%)**
6/30/2022 - Closed

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How The Fed Balance Sheet Roll-Off Could Affect ETFs

Expect Treasury yields to keep growing.

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Floating Rate Treasury ETF (USFR) Hits New 52-Week High

The floating rate treasury ETF USFR hits a 52-week high lately. Can it soar higher?

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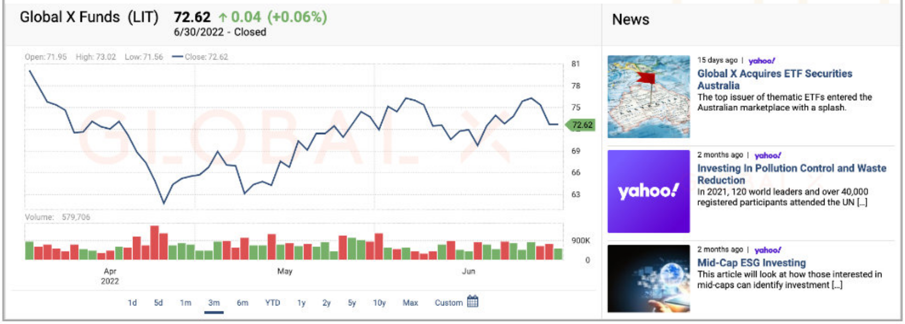
WisdomTree launches Solana, Cardano and Polkadot ETPs in Europe

ETPs provide exposure to emerging parts of the crypto ecosystemNEW YORK, March 31, […]

Portfolio Allocations

Global X Funds (LIT)

The investment seeks to provide investment results that correspond generally to the price and yield performance, before fees and expenses, of the Solactive Global Lithium Index. The fund invests at least 80% of its total assets in the securities of the underlying index and in American Depositary Receipts ("ADRs") and Global Depositary Receipts ("GDRs") based on the securities in the underlying index. The underlying index is designed to measure broad-based equity market performance of global companies involved in the lithium industry. The fund is non-diversified.



Global X Funds (LIT) **72.62** ↑ 0.04 (+0.06%)
6/30/2022 - Closed

Open: 71.95 High: 73.02 Low: 71.56 Close: 72.62
81
78
75
72.62
69
66
63
Volume: 579,706
900K
0
Apr
2022
May
Jun
1d 5d 1m 3m 6m YTD 1y 2y 5y 10y Max Custom

News

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The top issuer of thematic ETFs entered the Australian marketplace with a splash.

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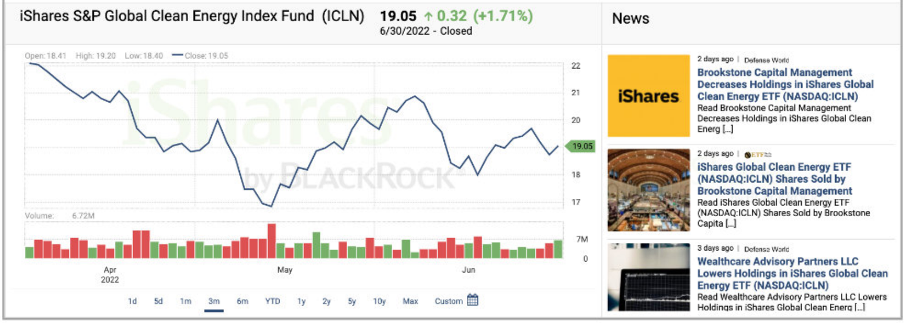
This article will look at how those interested in mid-caps can identify investment [...]

iShares S&P Global Clean Energy Index Fund (ICLN)

The investment seeks to track the investment results of the SP Global Clean Energy IndexTM composed of global equities in the clean energy sector. The index is designed to track the performance of approximately 100 clean energy-related companies. The fund generally invests at least 90% of its assets in the component securities of the index and in investments that have economic characteristics that are substantially identical to the component securities of the index and may invest up to 10% of its assets in certain futures, options and swap contracts, cash and cash equivalents, as well as in securities not included in the index. It is non-diversified.



iShares S&P Global Clean Energy Index Fund (ICLN) **19.05** ↑ 0.32 (+1.71%)
6/30/2022 - Closed

Open: 18.41 High: 19.20 Low: 18.40 Close: 19.05
22
21
20
19.05
18
17
Volume: 6.72M
7M
0
Apr
2022
May
Jun
1d 5d 1m 3m 6m YTD 1y 2y 5y 10y Max Custom

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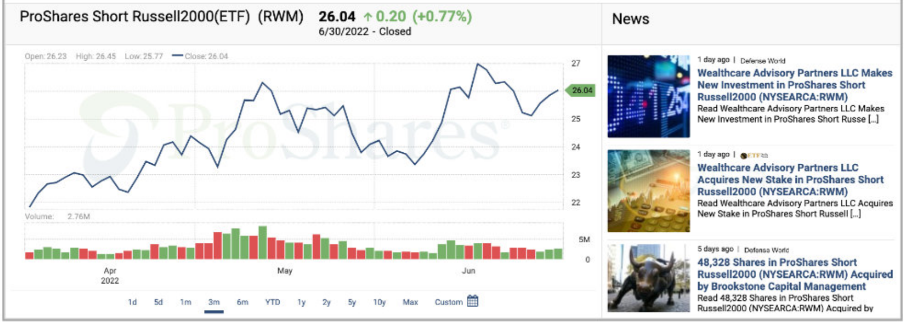
ProShares Short Russell2000(ETF)(RWM)

The investment seeks daily investment results that correspond to the inverse (-1x) of the daily performance of the Russell 2000 Index. The fund invests in financial instruments that ProShare Advisors believes, in combination, should produce daily returns consistent with the fund's investment objective. It is a float-adjusted, market capitalization-weighted index containing approximately 2000 of the smallest companies in the Russell 3000 Index or approximately 10% of the total market capitalization of the Russell 3000 Index, which in turn represents approximately 98% of the investable U.S. equity market. The fund is non-diversified.



ProShares Short Russell2000(ETF) (RWM) **26.04** ↑ 0.20 (+0.77%)
6/30/2022 - Closed

Open: 26.23 High: 26.45 Low: 25.77 Close: 26.04
27
26.04
25
24
23
22
Volume: 2.76M
5M
0
Apr
2022
May
Jun
1d 5d 1m 3m 6m YTD 1y 2y 5y 10y Max Custom

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48,328 Shares in ProShares Short Russell2000 (NYSEARCA:RWM) Acquired by Brookstone Capital Management
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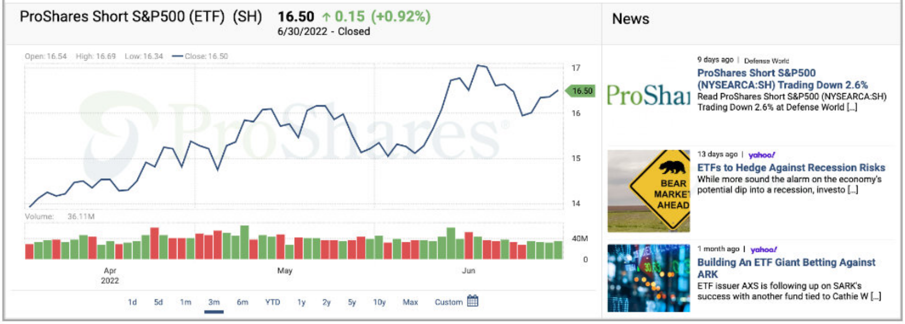
ProShares Short S&P500 (ETF)(SH)

The investment seeks daily investment results that correspond to the inverse (-1x) of the daily performance of the SP 500 Index. The fund invests in financial instruments that ProShare Advisors believes, in combination, should produce daily returns consistent with the fund's investment objective. The index is a measure of large-cap U.S. stock market performance. It is a float-adjusted, market capitalization-weighted index of 500 U.S. operating companies and real estate investment trusts selected through a process that factors in criteria such as liquidity, price, market capitalization and financial viability. The fund is non-diversified.



ProShares Short S&P500 (ETF) (SH) **16.50** ↑ 0.15 (+0.92%)
6/30/2022 - Closed

News

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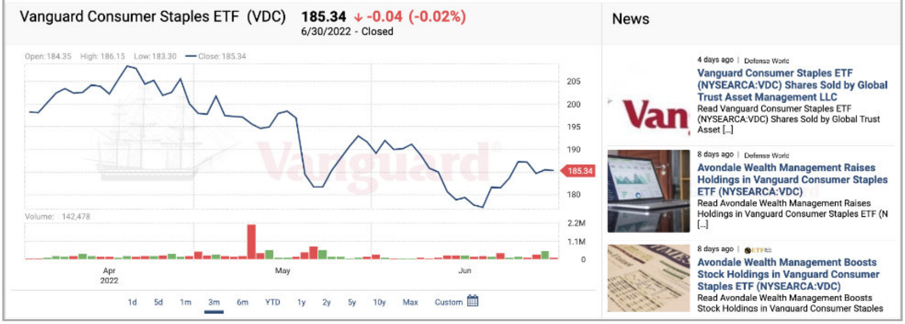
ETF issuer AXS is following up on SARK's success with another fund tied to Cathie W [...]

Vanguard Consumer Staples ETF(VDC)

The investment seeks to track the performance of a benchmark index. The fund employs an indexing investment approach designed to track the performance of the MSCI US Investable Market Index/Consumer Staples 25/50, an index made up of stocks of large, mid-size, and small U.S. companies within the consumer staples sector, as classified under the Global Industry Classification Standard. The Advisor attempts to replicate the target index by seeking to invest all, or substantially all, of its assets in the stocks that make up the index, in order to hold each stock in approximately the same proportion as its weighting in the index. The fund is non-diversified.



Vanguard Consumer Staples ETF (VDC) **185.34** ↓ -0.04 (-0.02%)
6/30/2022 - Closed

News

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Avondale Wealth Management Boosts Stock Holdings in Vanguard Consumer Staples ETF (NYSEARCA:VDC)
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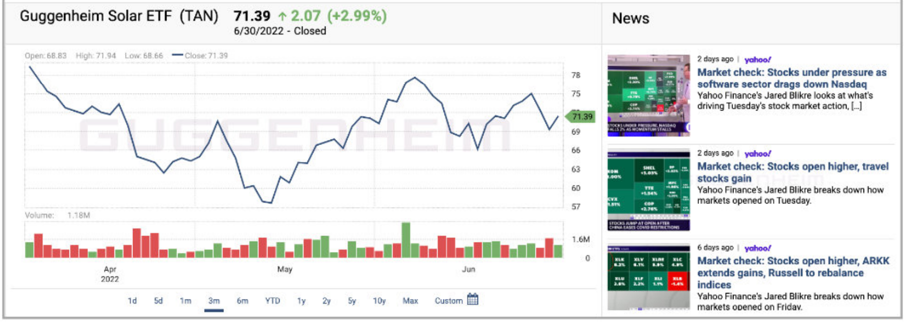
Guggenheim Solar ETF(TAN)

The investment seeks to track the investment results (before fees and expenses) of the MAC Global Solar Energy Index. The fund will generally invest at least 90% of its total assets in the securities (including American depositary receipts (ADRs)) that comprise the index. Strictly in accordance with its guidelines and mandated procedures, MAC Indexing LLC compiles, maintains, and calculates the index, which is designed to track the global solar energy equity sector. The fund is non-diversified.



Guggenheim Solar ETF (TAN) **71.39** ↑ 2.07 (+2.99%)
6/30/2022 - Closed

News

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Yahoo Finance's Jared Blikre looks at what's driving Tuesday's stock market action, [...]

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Yahoo Finance's Jared Blikre breaks down how markets opened on Tuesday.

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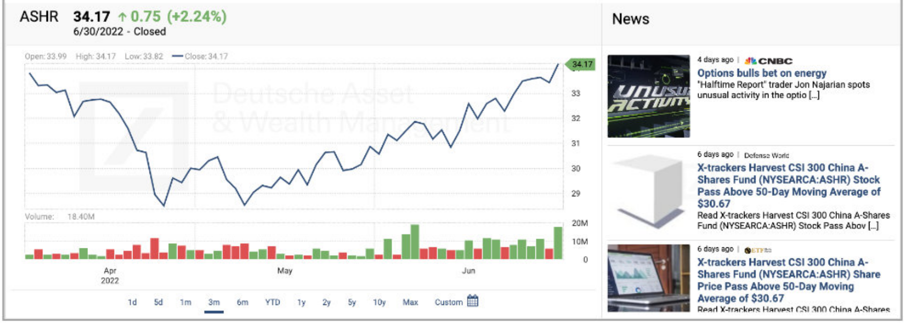
Market check: Stocks open higher, ARKK extends gains, Russell to rebalance indices
Yahoo Finance's Jared Blikre breaks down how markets opened on Friday.

Deutsche X-Trackers Harvest CSI 300 China A-Shares ETF(ASHR)

The investment seeks investment results that correspond generally to the performance, before fees and expenses, of the CSI 300 Index. The fund will normally invest at least 80% of its total assets in securities of issuers that comprise the underlying index. The underlying index is designed to reflect the price fluctuation and performance of the China A-Share market and is composed of the 300 largest and most liquid stocks in the China A-Share market. The underlying index includes small-cap, mid-cap, and large-cap stocks.



ASHR **34.17** ↑ 0.75 (+2.24%)
6/30/2022 - Closed

Open: 33.99 High: 34.17 Low: 33.82 Close: 34.17
34.17
33
32
31
30
29
Volume: 18.40M
20M
10M
0
Apr
2022
May
Jun
1d
5d
1m
3m
6m
YTD
1y
2y
5y
10y
Max
Custom
Deutsche Asset & Wealth Management

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"Halftime Report" trader Jon Najarian spots unusual activity in the optio [...]

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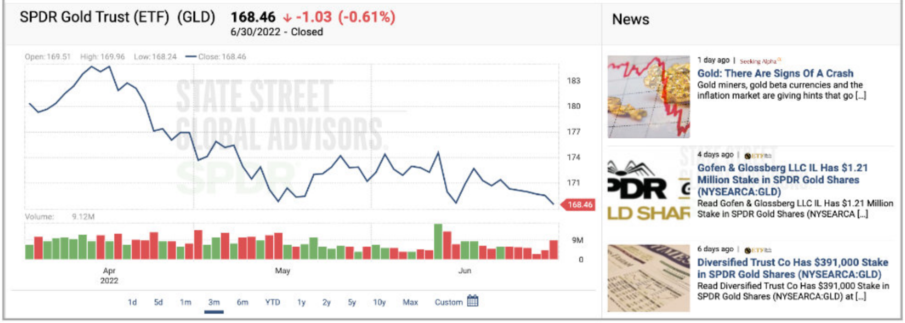
SPDR Gold Trust (ETF)(GLD)

The investment seeks to reflect the performance of the price of gold bullion, less the expenses of the Trusts operations. The Trust holds gold bars and from time to time, issues Baskets in exchange for deposits of gold and distributes gold in connection with redemptions of Baskets. The investment objective of the Trust is for the Shares to reflect the performance of the price of gold bullion, less the Trusts expenses. The Sponsor believes that, for many investors, the Shares represent a cost-effective investment in gold.



SPDR Gold Trust (ETF) (GLD) **168.46** ↓ -1.03 (-0.61%)
6/30/2022 - Closed

Open: 169.51 High: 169.96 Low: 168.24 Close: 168.46
183
180
177
174
171
168.46
Volume: 9.12M
9M
0
Apr
2022
May
Jun
1d
5d
1m
3m
6m
YTD
1y
2y
5y
10y
Max
Custom
STATE STREET GLOBAL ADVISORS SPDR

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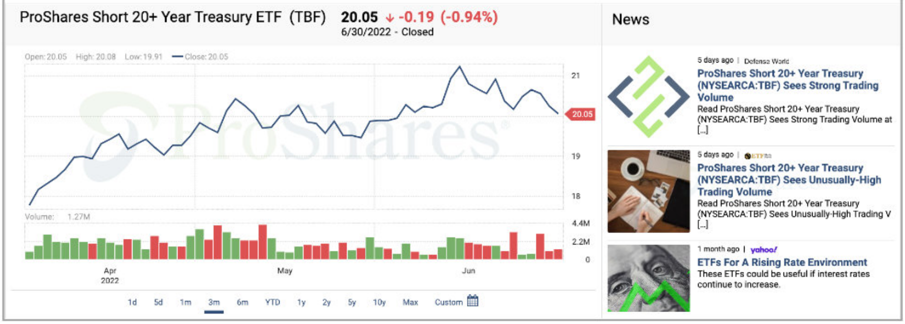
ProShares Short 20+ Year Treasury ETF(TBF)

The investment seeks daily investment results, before fees and expenses, that correspond to the inverse (-1x) of the daily performance of the ICE U.S. Treasury 20+ Year Bond Index. The fund invests in financial instruments that ProShare Advisors believes, in combination, should produce daily returns consistent with the fund's investment objective. The index includes publicly- issued U.S. Treasury securities that have a remaining maturity greater than or equal to twenty years and have $300 million or more of outstanding face value, excluding amounts held by the Federal Reserve. The fund is non-diversified.



ProShares Short 20+ Year Treasury ETF (TBF) **20.05** ↓ -0.19 (-0.94%)
6/30/2022 - Closed

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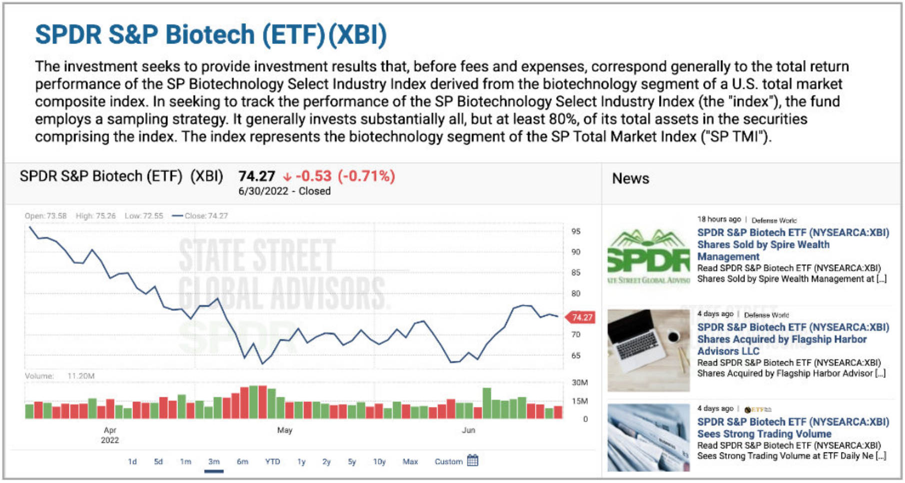

SPDR S&P Biotech (ETF)(XBI)

The investment seeks to provide investment results that, before fees and expenses, correspond generally to the total return performance of the SP Biotechnology Select Industry Index derived from the biotechnology segment of a U.S. total market composite index. In seeking to track the performance of the SP Biotechnology Select Industry Index (the "index"), the fund employs a sampling strategy. It generally invests substantially all, but at least 80%, of its total assets in the securities comprising the index. The index represents the biotechnology segment of the SP Total Market Index ("SP TMI").

SPDR S&P Biotech (ETF) (XBI) **74.27** ↓ -0.53 (-0.71%)
6/30/2022 - Closed

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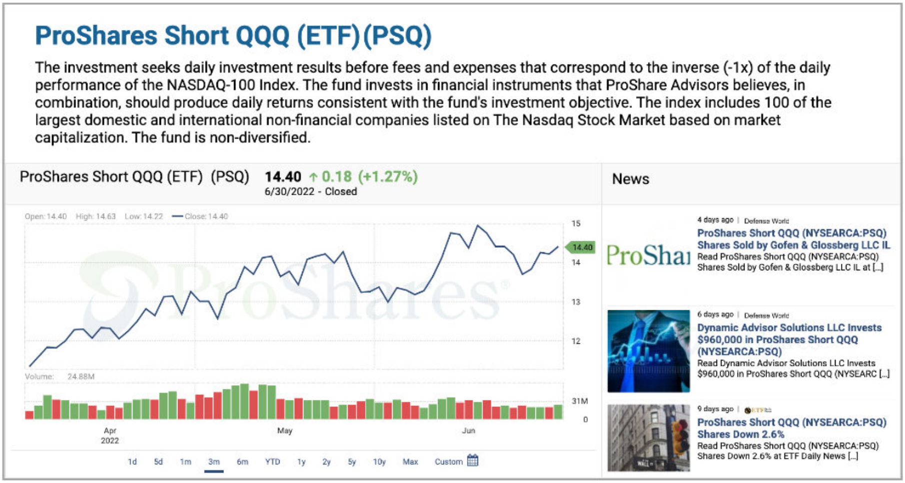

ProShares Short QQQ (ETF)(PSQ)

The investment seeks daily investment results before fees and expenses that correspond to the inverse (-1x) of the daily performance of the NASDAQ-100 Index. The fund invests in financial instruments that ProShare Advisors believes, in combination, should produce daily returns consistent with the fund's investment objective. The index includes 100 of the largest domestic and international non-financial companies listed on The Nasdaq Stock Market based on market capitalization. The fund is non-diversified.

ProShares Short QQQ (ETF) (PSQ) **14.40** ↑ 0.18 (+1.27%)
6/30/2022 - Closed

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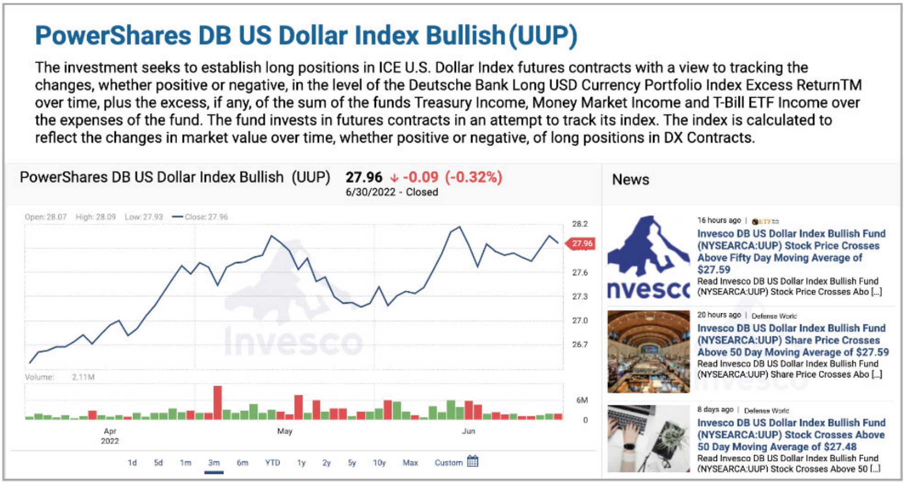

PowerShares DB US Dollar Index Bullish(UUP)

The investment seeks to establish long positions in ICE U.S. Dollar Index futures contracts with a view to tracking the changes, whether positive or negative, in the level of the Deutsche Bank Long USD Currency Portfolio Index Excess ReturnTM over time, plus the excess, if any, of the sum of the funds Treasury Income, Money Market Income and T-Bill ETF Income over the expenses of the fund. The fund invests in futures contracts in an attempt to track its index. The index is calculated to reflect the changes in market value over time, whether positive or negative, of long positions in DX Contracts.

PowerShares DB US Dollar Index Bullish (UUP) **27.96** ↓ -0.09 (-0.32%)
6/30/2022 - Closed

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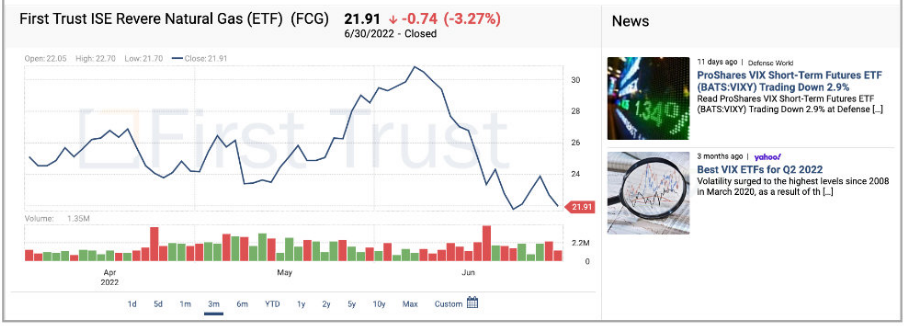
ProShares Trust II (VIXY)

The investment seeks investment results, before fees and expenses, that over time, match the performance of the SP 500 VIX Short-Term Futures Index for a single day. The index seeks to offer exposure to market volatility through publicly traded futures markets and is designed to measure the implied volatility of the SP 500 over 30 days in the future.



First Trust ISE Revere Natural Gas (ETF) (FCG) **21.91** ↓ -0.74 (-3.27%)
6/30/2022 - Closed

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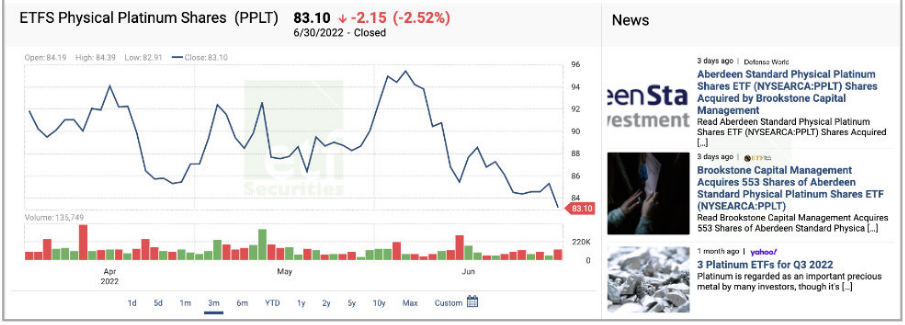
Volatility surged to the highest levels since 2008 in March 2020, as a result of th [...]

Open: 22.05 High: 22.70 Low: 21.70 Close: 21.91
First Trust
30
28
26
24
21.91
Volume: 1.35M
2.2M
0
Apr 2022
May
Jun
1d 5d 1m 3m 6m YTD 1y 2y 5y 10y Max Custom

ETFS Physical Platinum Shares (PPLT)

The investment seeks to reflect the performance of the price of physical platinum, less the expenses of the Trusts operations. The fund designed for investors who want a cost-effective and convenient way to invest in platinum with minimal credit risk. Advantages of investing in the Shares include Ease and Flexibility of Investment, Expenses, Minimal Credit Risk.



ETFS Physical Platinum Shares (PPLT) **83.10** ↓ -2.15 (-2.52%)
6/30/2022 - Closed

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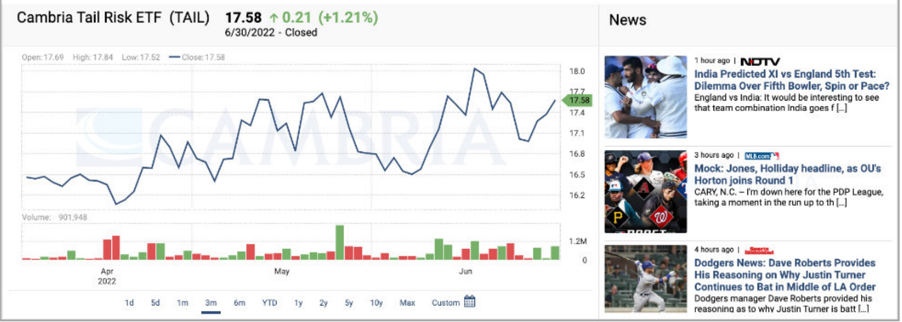
Platinum is regarded as an important precious metal by many investors, though it's [...]

Open: 84.19 High: 84.39 Low: 82.91 Close: 83.10
Securities
96
94
92
90
88
86
84
83.10
Volume: 135,749
220K
0
Apr 2022
May
Jun
1d 5d 1m 3m 6m YTD 1y 2y 5y 10y Max Custom
een Sta
estment

Cambria Tail Risk ETF (TAIL)

The investment seeks to provide income and capital appreciation from investments in the U.S. market while protecting against significant downside risk. The fund is actively managed and seeks to achieve its investment objective by investing in cash and U.S. government bonds, and utilizing a put option strategy to manage the risk of a significant negative movement in the value of domestic equities. The adviser intends to spend approximately one percent of the fund's total assets per month to purchase put options.



Cambria Tail Risk ETF (TAIL) **17.58** ↑ 0.21 (+1.21%)
6/30/2022 - Closed

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Dodgers manager Dave Roberts provided his reasoning as to why Justin Turner is batt [...]

Open: 17.69 High: 17.84 Low: 17.52 Close: 17.58
CAMBRIA
18.0
17.7
17.58
17.4
17.1
16.8
16.5
16.2
Volume: 901,948
1.2M
0
Apr 2022
May
Jun
1d 5d 1m 3m 6m YTD 1y 2y 5y 10y Max Custom

Methodologies & Disclosures

AN ALL-WEATHER PORTFOLIO

About Our Methodology

First and foremost, Signals Matter Portfolios are built as all-weather portfolios, geared to perform in good times and in bad. To perform in all-weather conditions, we take an active approach to portfolio management and seek to perform without regard to a particular benchmark, like the S&P 500 Index or similar. Active managers like Signals Matter do not peg portfolio performance to passively-managed indexes as we do not seek relative value. Rather, we take an actively-managed approach that solves for absolute-return (not relative return) based upon deep fundamental insight informed by our Market Reports, Storm Tracker, and at the portfolio level, by the relative strength, trend, volatility, correlation, money-flows, and other such more technical metrics.

HOW WE BUILD OUR PORTFOLIOS

About Our ETF Universe

Exchange Traded Funds (ETFs) are key to our portfolio methodology, providing wealthy and unaccredited investors alike a simple wrap solution to diversified investing. ETFs run the gambit across not just stocks & bonds, but currencies, commodities, thematic investing, even inverse ETFs that bet against the markets and embrace volatility. The surge in ETF investing is marking a historic capitulation by the mutual fund industry. Investors have long been migrating to cheaper, easier-to-trade, and more tax-efficient ETFs, especially actively-managed ETFs that provide options for investors to diversify away from stocks and bonds. Wrapping diversified ETFs into an actively managed portfolio can provide optimal diversity for investors. Each ETF typically includes 25-50 underlying securities. Portfolios with 20 ETFs typically hold 350-500 underlying positions, providing extensive diversification.

OUR PURPOSE IS TO EDUCATE

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