Beaumont Capital Management (BCM)
Decathlon Tactics Overview

Global, Go Anywhere, Growth Strategies with "Guardrails"

- Tactical, global growth portfolios designed to maximize returns within maximum volatility and drawdown targets, seeking to provide a degree of downside protection

- Predictive, quantitative approach, driven by machine learning, seeking to remove emotion from the investment process

- Selects from a curated global investment pool of long-only ETFs representing virtually all asset classes

BCM Decathlon Conservative Tactics	7% target for volatility *and* maximum drawdown Maximum **50%** equity allocation
BCM Decathlon Moderate Tactics	12% target for both volatility *and* maximum drawdown
BCM Decathlon Growth Tactics	16% target for both volatility *and* maximum drawdown

Decathlon Tactics' Role in a Portfolio

Sample Portfolio

Strategic Equity

Strategic Fixed Income

Tactical Strategist(s)

- Add as a **global complement** to strategic allocations seeking to build an overall portfolio that **can succeed in most market conditions**

- Tactically **unconstrained** with the ability to shift to virtually **any asset class and geography** as market conditions change, seeking to make the tactical buy and sell decisions for you

- Seeking to **reduce volatility and drawdown** on at least a portion of the portfolio; and allows you to select your **desired level of risk**

About Beaumont Capital Management

Beaumont Capital Management (BCM) is an asset manager that provides solutions focused on improving investors' experiences and outcomes. Using technology, quantitative research and rules-based processes we seek to remove emotion from investing and provide growth with an emphasis on downside risk management.

We are all human. We all have emotions. Emotions don't belong in the investment decision making process. So we created rules-based processes to make the buy and sell decisions so our clients don't have to, seeking to *Deliver What Investors Expect®*.

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The Decathlon Tactics Process

Step 1:

Every day, the underlying quantitative models use Pattern Recognition Technology (PRT), driven by machine learning, to **analyze the historical return and volatility data of each ETF** in the investment universe.

The PRT is seeking **to identify** statistically relevant **patterns that are repeating today** to predict the returns of each ETF over the next 25 trading days.

Step 2:

The system will then **rank those patterns (ETFs) from the highest predicted risk-adjusted returns** to the lowest predicted returns expected for the next 25 trading days.

The system is designed to create portfolios that have overall drawdown and volatility within the specified target levels.

Step 3:

When the portfolio is rebalanced, the **10 highest ranked, risk-appropriate ETFs** are included in the portfolio in **10% equal weights**.

The portfolio manager maintains full discretion over the portfolios.

The Decathlon Tactics portfolios are **GIPS® verified.**

BCM Decathlon Aspect ETF Universe
Geographical and asset class breakdown (as of 6/30/20):

32 U.S. Equity ETFs — Broad Index / Sector Sub-sector

29 Int'l Equity ETFs — Dev. Index / Dev. Country Emerging Market / Sector

13 Global Equity ETFs — Broad Index / Sector

27 Fixed Income ETFs — Domestic / International

12 Alternative ETFs — Currency / Commodity REIT / Preferred Stock

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Decathlon selects from the managed investment pool of long-only ETFs representing virtually every investable asset class.

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Beaumont
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