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Actual Investors

Catalyst/Lyons Tactical Allocation I CLTIX ★★★★★

Morningstar Analyst Rating

Quantitative rating as of May 31, 2021

[Quote](#) [Fund Analysis](#) [Performance](#) [Risk](#) [Price](#) [Portfolio](#) [People](#) [Parent](#)

Performance

Returns

Distributions

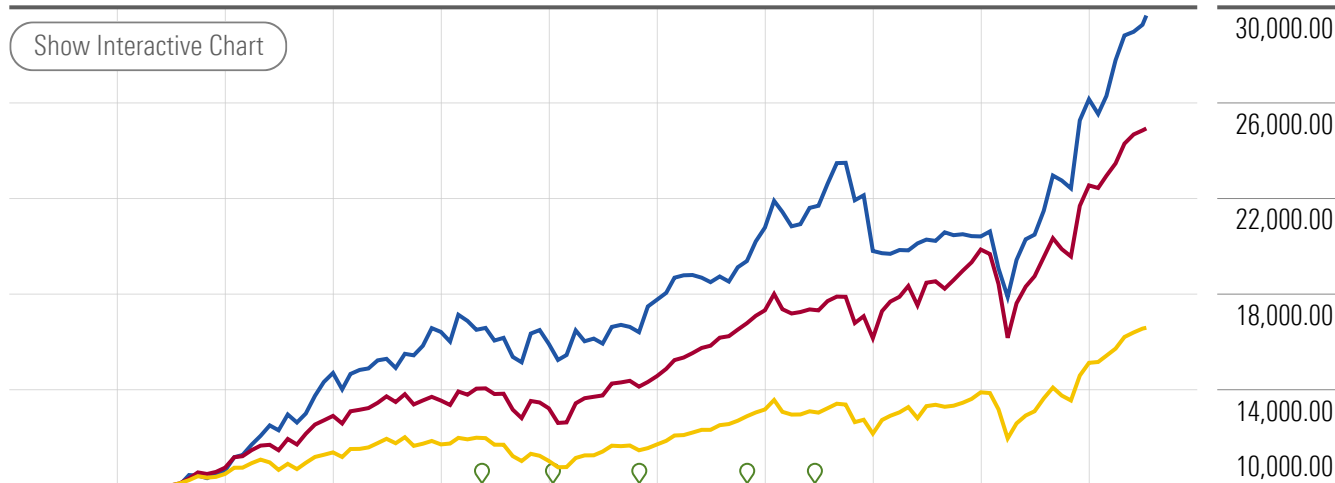
Growth of 10,000

Investment
Category
Index
Investment Flows

Manager Change

Full
Partial

Show Interactive Chart



Growth

30,000.00

26,000.00

22,000.00

18,000.00

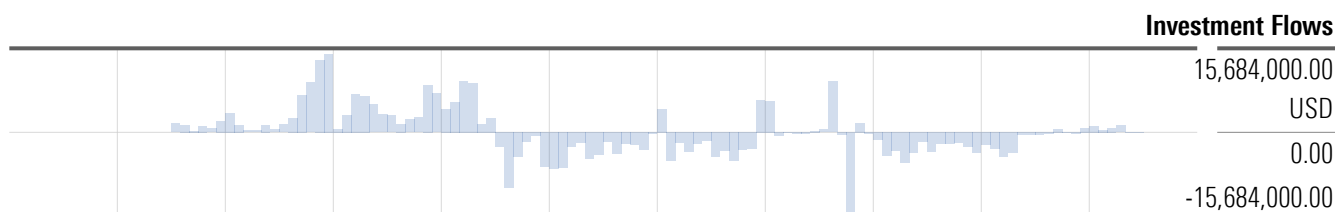
14,000.00

10,000.00

CLTIX
29,656

Index
24,931

Category
16,594



Total Return %	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	YTD
Investment	—	—	<i>38.45</i>	<i>11.68</i>	-3.04	11.61	17.00	-4.72	3.07	28.12	13.38
+/- Category	—	—	<i>29.83</i>	<i>9.26</i>	2.89	5.63	4.36	2.97	-11.54	18.29	3.41
+/- Index	—	—	<i>18.28</i>	<i>6.70</i>	-0.64	1.40	-1.89	2.02	-19.87	14.61	2.82
Quartile Rank	—	—	—	—							
Percentile Rank	—	—	—	—	75	34	86	33	99	9	20
# of Investment in Cat.	153	203	248	304	327	309	312	272	264	243	261

USD | YTD Investment as of Jul 13, 2021 | Category: Tactical Allocation as of Jul 13, 2021 | Index: Morningstar Mod Agg Tgt Risk TR USD as of Jul 13, 2021 | Italics indicate Extended Performance. Extended performance is an estimate based on the performance of the investment's oldest share class, adjusted for fees.

Trailing Returns

Day End Month End Quarter End

	1-Month	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	15-Year	Si
Total Return %	1.01	5.33	11.91	42.86	10.49	12.94	—	—	
+/- Category	0.04	0.11	2.22	15.41	1.64	4.38	—	—	
+/- Index	0.32	-0.55	1.71	10.31	-2.29	0.39	—	—	
Quartile Rank							—	—	
Percentile Rank	47	51	25	13	22	9	—	—	
Investor Return %	—	—	—	41.50	1.15	5.74	—	—	
Percentile Rank (Inv Rtn)	—	—	—	13	93	62	—	—	

# of Investments in Cat.	1-Month	3-Month	YTD	1-Year	3-Year	5-Year	10-Year	15-Year	Si
	265	265	263	255	237	196	89	39	

USD | Investment return as of Jun 30, 2021 | Category: Tactical Allocation as of Jun 30, 2021 | Index: Morningstar Mod Agg Tgt Risk TR USD as of Jun 30, 2021 | Inception date Jun 06, 2014 | Time periods greater than 1 year are annualized

Star Rating ★★★★★

★★★★★
3-Year

★★★★★
5-Year

—
10-Year

Analyst Rating

Morningstar Analyst Rating

Category Medalist

Name

Analyst Rating

AQR Multi-Asset I

American Beacon AHL TargetRisk Y

BNY Mellon Global Real Return - I

Eaton Vance Rich Bern All Asst Strat I

There is no Analyst Rating data available

All Funds by Classification

Asset Class

U.S. Equity
Asset Allocation
International Equity
Sector Equity
Alternative
Commodities
Taxable Bond
Municipal Bond

Equity

Large Value Funds
Large Blend Funds
Large Growth Funds
Mid-Cap Value Funds
Mid-Cap Blend Funds
Mid-Cap Growth Funds
Small Value Funds
Small Blend Funds
Small Growth Funds
Real Estate Funds
World Large Stock Funds
Foreign Large Blend Funds
Foreign Small/Mid Blend Funds
Diversified Emerging Markets Funds

Fixed-Income

Intermediate-Term Core Bond Funds

Intermediate-Term Core-Plus Bond Funds

Corporate Bond Funds

High Yield Bond Funds

Muni National Short-Term Bond Funds

Muni National Intermediate-Term Bond Funds

Muni National Long-Term Bond Funds

Ultrashort Bond Funds

Fund Type

Index Funds

Target Date Funds

Target Risk Funds

ESG Funds

Sponsor Center

Morningstar
Personal Finance
Center

TD Ameritrade
Interested in
an IRA? 

Sign up now.
E*TRADE

Morningstar
Premium
Free for 14 Days



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Transparency is how we protect the integrity of our work and keep empowering investors to achieve their goals and dreams. And we have unwavering standards for how we keep that integrity intact, from our research and data to our policies on content and your personal data.

We'd like to share more about how we work and what drives our day-to-day business.

► **How we make money**

► **How we use your personal data**

► **How we approach editorial content**



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