

# STRONGVIEW

I N V E S T M E N T M A N A G E M E N T

# Why choose Strongview?

## Unconflicted

Focused on Portfolio Management

Investment Strategy

Historical Returns

Fees

# Unconflicted

We work for the client, not the BANK.

We are bank agnostic.

Total focus on portfolio performance not Bank ROA.

- Our compensation is based on total portfolio performance, NOT commissions generated.
- Long-term performance of our clients is the focus.

Complete transparency on fees, rebates from the banks.

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Historical Returns

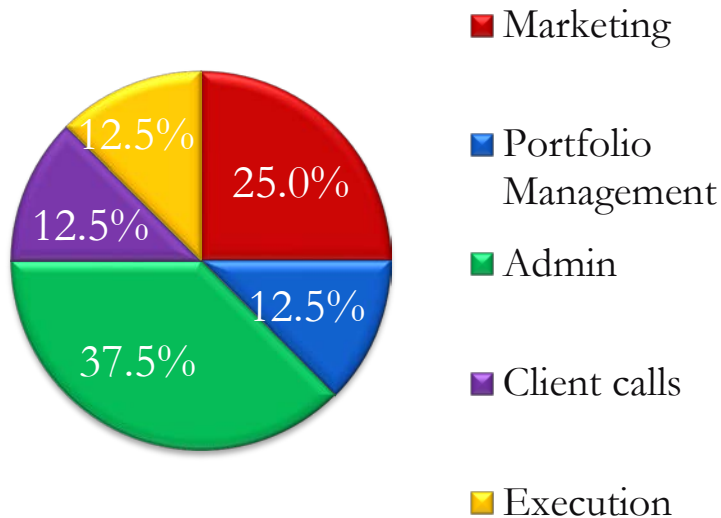
Fees

# Focused on Portfolio Management

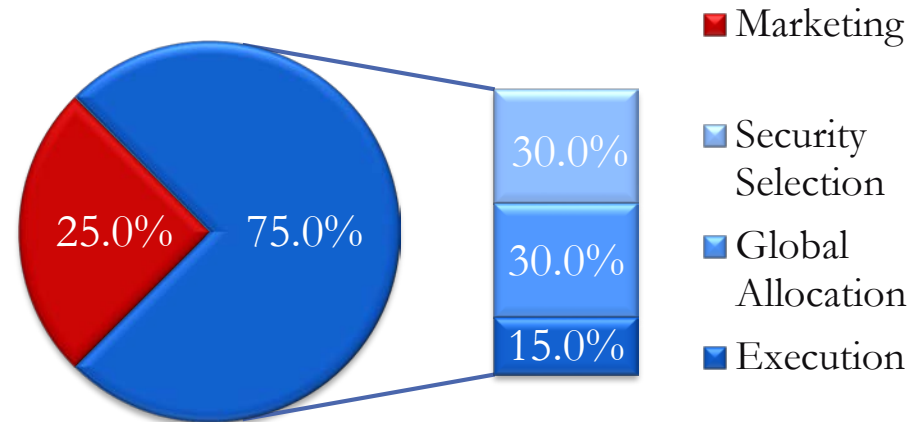
- i. Day in the Life
- ii. Realtime Monitoring and Rebalancing
- iii. Best of Breed Research

# Focused on Portfolio Management (i): Day in the Life

## Day in a Private Bank



## Day in Strongview



## Focused on Portfolio Management (ii): Realtime Monitoring and Rebalancing

**Daily** monitoring of markets and securities

Technical: price action, momentum, and sentiment

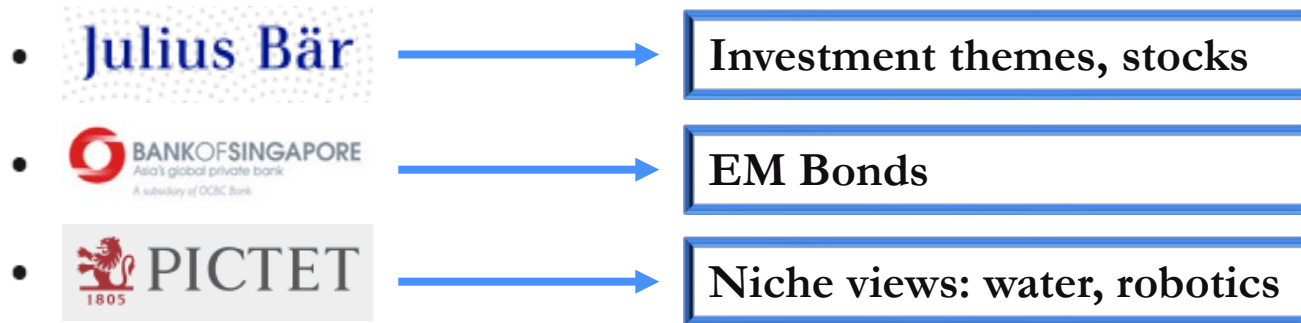
Fundamental: valuation

**Weekly** portfolio review

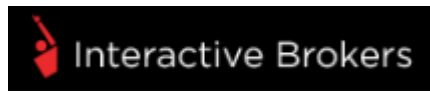
**Monthly** asset allocation review

## Focused on Portfolio Management (iii): Best of Breed Research

- Distill research from various private banks and newsfeeds to identify and monitor investment ideas



- Other resources:





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**Investment Strategy**

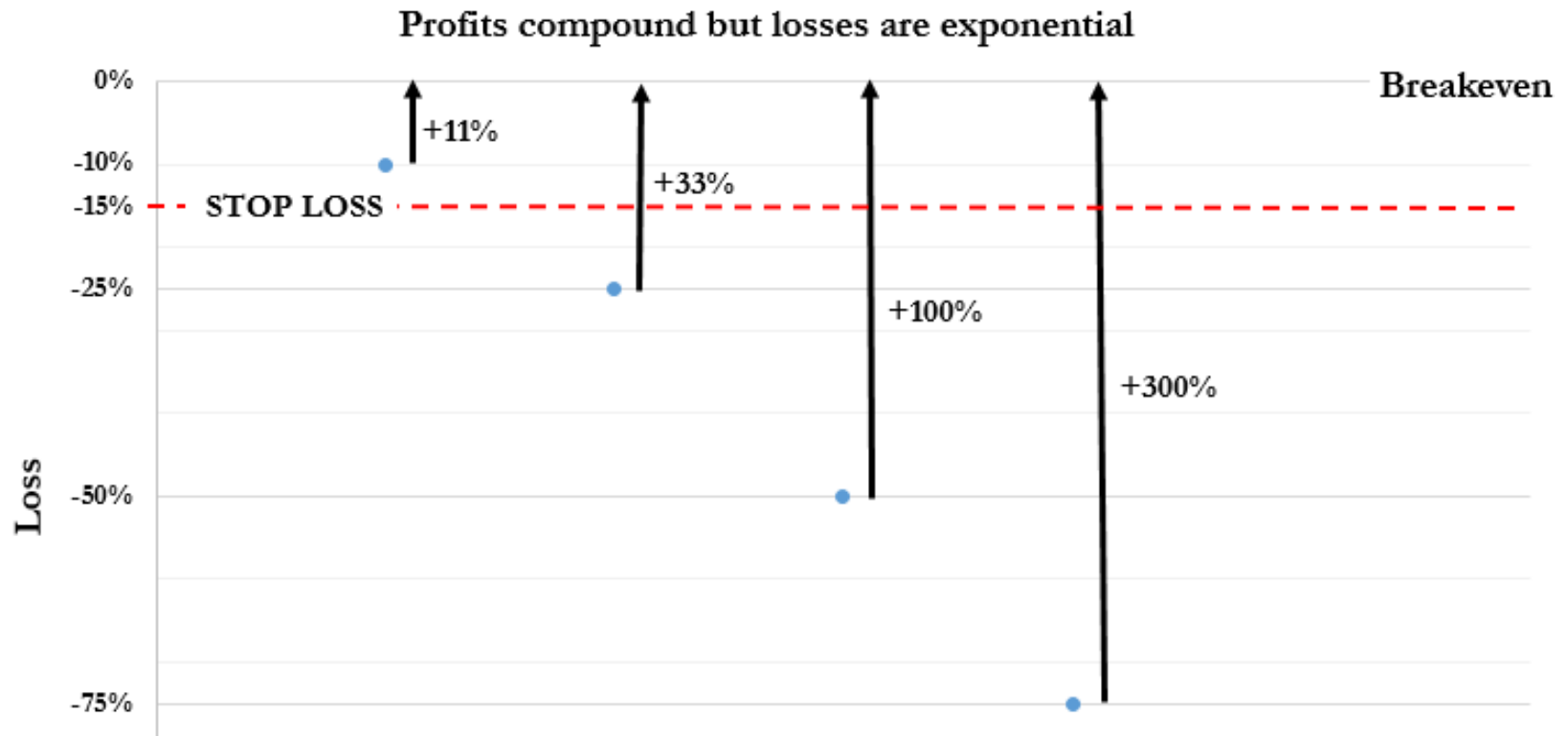
Historical Returns

Fees

# Investment Strategy

- i. Capital Preservation
- ii. Asset Allocation accounts for 70% of Returns
- iii. Technicals Signaling Momentum

# Investment Strategy (i): Capital Preservation: Strict Stop Loss



# Investment Strategy (ii):

## Asset Allocation accounts for 70% of returns

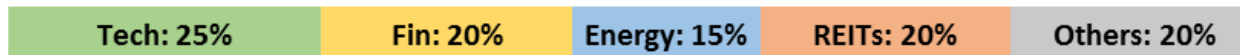
### Asset Allocation



### Geographical Allocation



### Sector Allocation



**FX  
Overlay**

# Investment Strategy (iv): Technical Signaling Momentum



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Investment Strategy

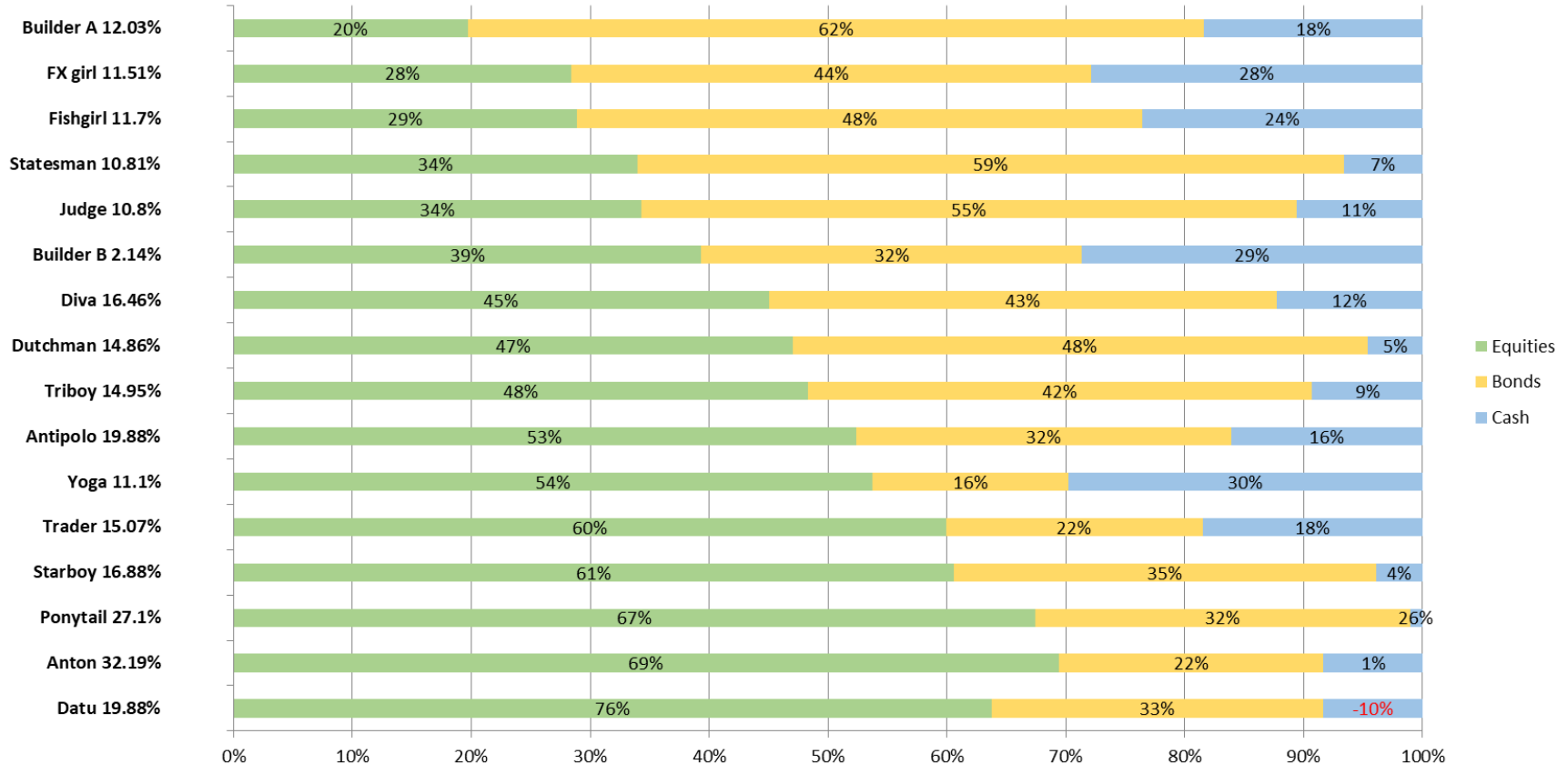
**Historical Returns**

Fees

# Historical Returns:

## YTD Returns

November 27 YTD Returns and Asset Allocation



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Fees



# Fees

- Management Fee: 80bps of Assets Under Management (AUM)
- Bank compensation will be netted out