

Lead Portfolio

BenchMark

Initial Amount

Lookback Period

Equity Rotation\*

Morningstar All-Cap Core AW

\$100,000

9.4 Years

Equity Rotation\*



63

RISK SCORE



-18.44%

MAX DRAWDOWN



11.72%

RETURN (CAGR)



181.40%

TOTAL RETURN

Morningstar All-Cap Core AW



70

RISK SCORE



-26.47%

MAX DRAWDOWN



10.02%

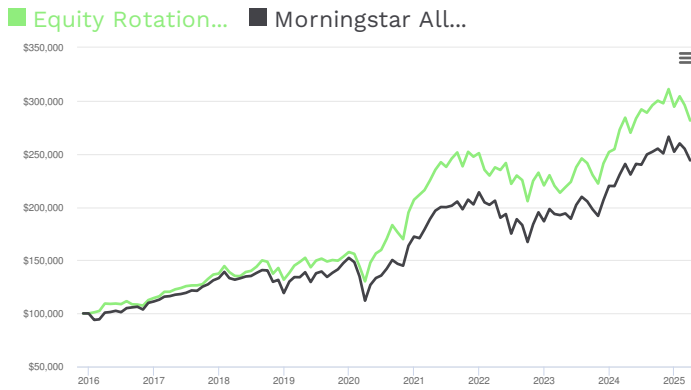
RETURN (CAGR)



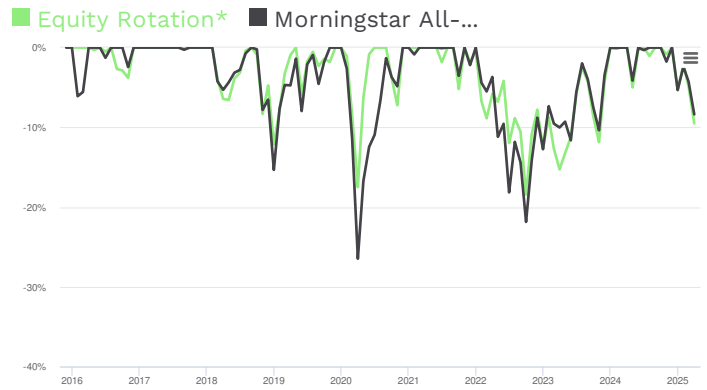
143.92%

TOTAL RETURN

Performance (Total Returns)



Max Drawdown



Performance and Risk Metrics

	Equity Rotation*	Morningstar All-Cap Core AW
Total Return	181.40%	143.92%
Avg Return (CAGR)	11.72%	10.02%
Max Drawdown	-18.44%	-26.47%
Calmar Ratio	0.64	0.38
Historical VaR	7.54%	8.72%
Std. Deviation	14.96%	16.18%
Downside Deviation	9.18%	10.74%
Mean Return (Monthly)	1.02%	0.91%
Mean Return (Annualized)	12.96%	11.48%
Sharpe Ratio	0.54%	0.42%
Beta	0.89	1.01
Correlation	0.91	0.96
R-Squared	83.06%	91.58%
*Cycle-Based Upside	82.25%	90.28%
*Cycle-Based Downside	81.38%	121.87%
Annual Dividend Yield	0.00%	0.00%
Expense Ratio	0%	0%

Cycle-based upside/downside uses S&P 500 data and always includes all available data points

**\* Disclosures:**

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The Optimus performance results do not reflect the impact of taxes.

Risk Score is independently calculated by OnPointe Risk Analyzer. Optimus Advisory Group is not affiliated with OnPointe Risk Analyzer.