

Lead Portfolio

BenchMark

Initial Amount

Lookback Period

Tactical Bond\*

Bloomberg US Aggregate Bond (TR)

\$100,000

6.7 Years

Tactical Bond\*



26

RISK SCORE



-15.8%

MAX DRAWDOWN



3.27%

RETURN (CAGR)



23.56%

TOTAL RETURN

Bloomberg US  
Aggregate Bond (TR)


20

RISK SCORE



-17.2%

MAX DRAWDOWN



2.01%

RETURN (CAGR)

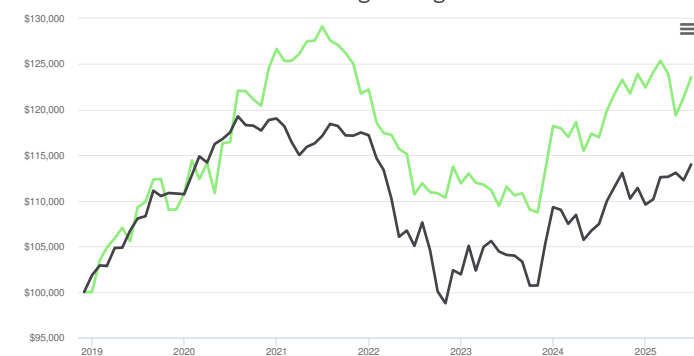


14.00%

TOTAL RETURN

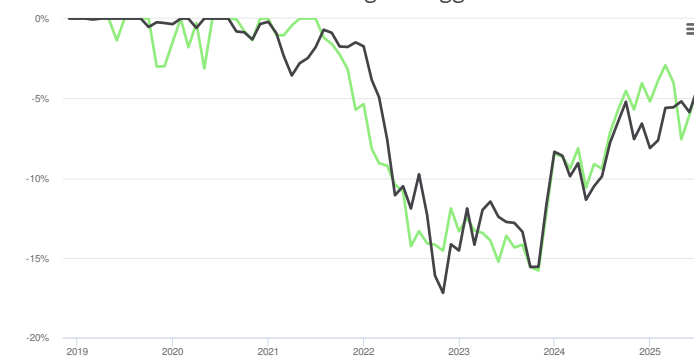
## Performance (Total Returns)

Tactical Bond\* Bloomberg US Ag...



## Max Drawdown

Tactical Bond\* Bloomberg US Ag...



## Performance and Risk Metrics

	Tactical Bond*	Bloomberg US Aggregate Bond (TR)
Total Return	23.56%	14.00%
Avg Return (CAGR)	3.27%	2.01%
Max Drawdown	-15.8%	-17.2%
Calmar Ratio	0.21	0.12
Historical VaR	3.01%	2.83%
Std. Deviation	6.58%	5.82%
Downside Deviation	3.89%	3.91%
Mean Return (Monthly)	0.29%	0.18%
Mean Return (Annualized)	3.49%	2.18%
Sharpe Ratio	-0.17%	-0.41%
Beta	0.18	0.14
Correlation	0.48	0.43
R-Squared	22.65%	18.08%
*Cycle-Based Upside	22.79%	15.27%
*Cycle-Based Downside	12.21%	0.34%
Annual Dividend Yield	0.00%	0.00%
Expense Ratio	0%	0%

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

**\* Disclosures:**

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