

Lead Portfolio

BenchMark

Initial Amount

Lookback Period

Dynamic Equity*

Morningstar All-Cap Core AW

\$100,000

10.2 Years

Dynamic Equity*



57

RISK SCORE



-24.22%

MAX DRAWDOWN



9.71%

RETURN (CAGR)



156.57%

TOTAL RETURN

Morningstar All-Cap Core AW



70

RISK SCORE



-26.47%

MAX DRAWDOWN



11.40%

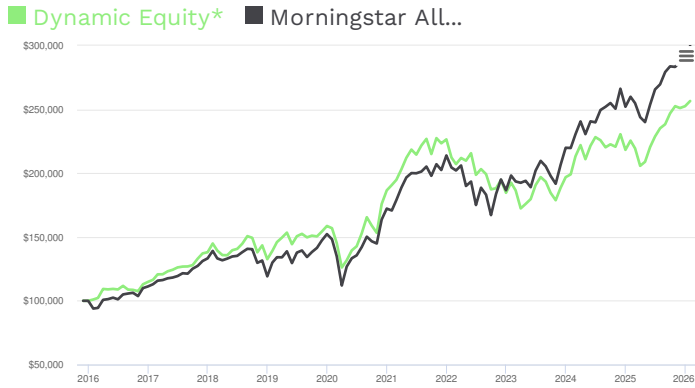
RETURN (CAGR)



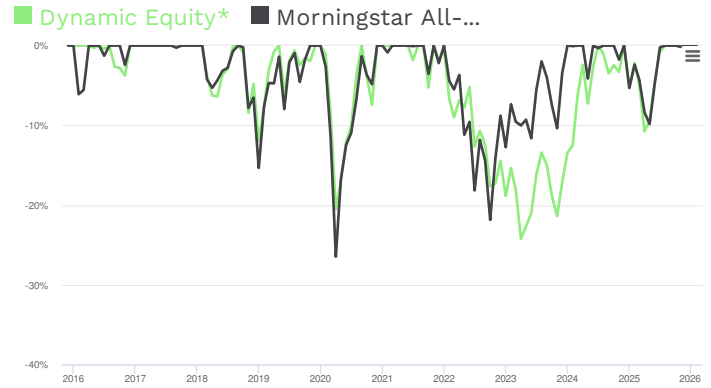
199.78%

TOTAL RETURN

Performance (Total Returns)



Max Drawdown



Performance and Risk Metrics

	Dynamic Equity*	Morningstar All-Cap Core AW
Total Return	156.57%	199.78%
Avg Return (CAGR)	9.71%	11.40%
Max Drawdown	-24.22%	-26.47%
Calmar Ratio	0.4	0.43
Historical VaR	7.44%	7.8%
Std. Deviation	13.96%	15.69%
Downside Deviation	9.27%	10.29%
Mean Return (Monthly)	0.86%	1.01%
Mean Return (Annualized)	10.78%	12.79%
Sharpe Ratio	0.4%	0.47%
Beta	0.8	1
Correlation	0.85	0.95
R-Squared	72.42%	90.97%
*Cycle-Based Upside	78.3%	91.08%
*Cycle-Based Downside	107.73%	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.