

Lead Portfolio

BenchMark

Initial Amount

Lookback Period

Equity Rotation*

Morningstar All-Cap Core AW

\$100,000

10.2 Years

Equity Rotation*



53

RISK SCORE



-18.44%

MAX DRAWDOWN



12.57%

RETURN (CAGR)



233.33%

TOTAL RETURN

Morningstar All-Cap Core AW



70

RISK SCORE



-26.47%

MAX DRAWDOWN



11.40%

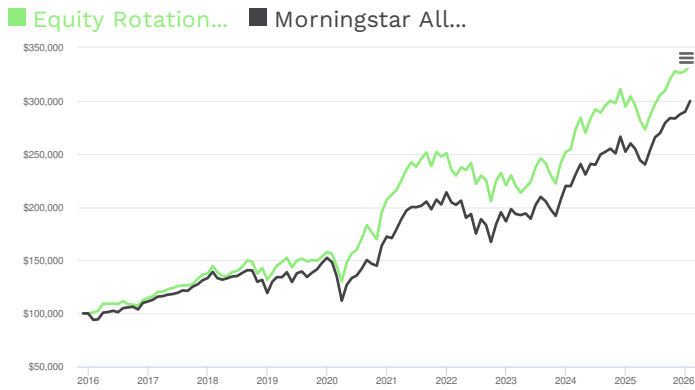
RETURN (CAGR)



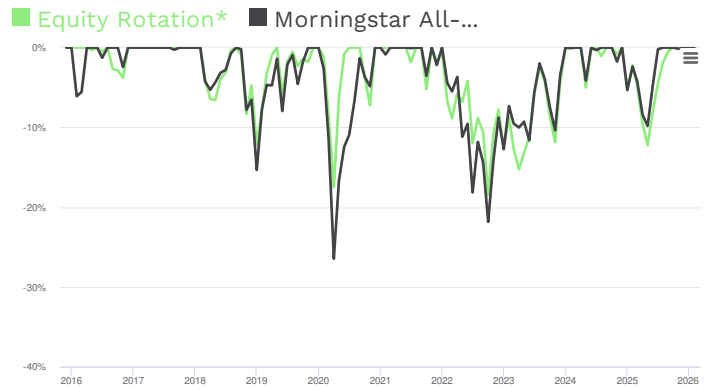
199.78%

TOTAL RETURN

Performance (Total Returns)



Max Drawdown



Performance and Risk Metrics

	Equity Rotation*	Morningstar All-Cap Core AW
Total Return	233.33%	199.78%
Avg Return (CAGR)	12.57%	11.40%
Max Drawdown	-18.44%	-26.47%
Calmar Ratio	0.68	0.43
Historical VaR	7.48%	7.8%
Std. Deviation	14.51%	15.69%
Downside Deviation	8.84%	10.29%
Mean Return (Monthly)	1.08%	1.01%
Mean Return (Annualized)	13.75%	12.79%
Sharpe Ratio	0.57%	0.47%
Beta	0.89	1
Correlation	0.91	0.95
R-Squared	83.1%	90.97%
*Cycle-Based Upside	82.63%	91.08%
*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.