## STIR Fund Family Research
## FF053 - Fact Sheet - Q1 2021

**Model Number:**
FF053

**Model Position Changes:**
Evaluated Quarterly
STIR provides timely clear Buy, Hold and Sell signals along with recommended percentage allocations.

**STIR Illustrator Tool:**
Updated Monthly for history including Standard Deviation & Beta visit our website @ www.stirresearch.com

Model: FF053
S&P 500 Index—SP-DA

**Model Goal:**
The goal of FF053 is to provide an absolute return (positive gains every year). Outperform the benchmark, fixed allocation and life style funds. Assume less risk. Adding alpha (excess return adjusted for risk).

**PIMCO WITH RISK MANAGEMENT**
Diversified equity model portfolio FF053, provides flexibility, reduces portfolio volatility, and risk factors. This tactical rotation model applies STIR proprietary Relative Strength Analysis to identify the top four performing funds (leadership), chosen from the many excellent choices available within this fund family, representing different asset groups: style boxes, internationals, sectors and specialty, with the flexibility to change the asset mix as leadership changes. During bear market declines, the STIR Market Environment Indicator will build a 50% defensive cash position. STIR provides clear buy and sell recommendations, and full historical data. This time tested model has experienced both Bull and Bear markets.

**BEST USE OF FF053**
An excellent stand alone model for a 100% tactical allocation. Also incorporate this model into a traditional 'buy and hold' strategy, and create a more diversified 'Core & Explore' allocation.

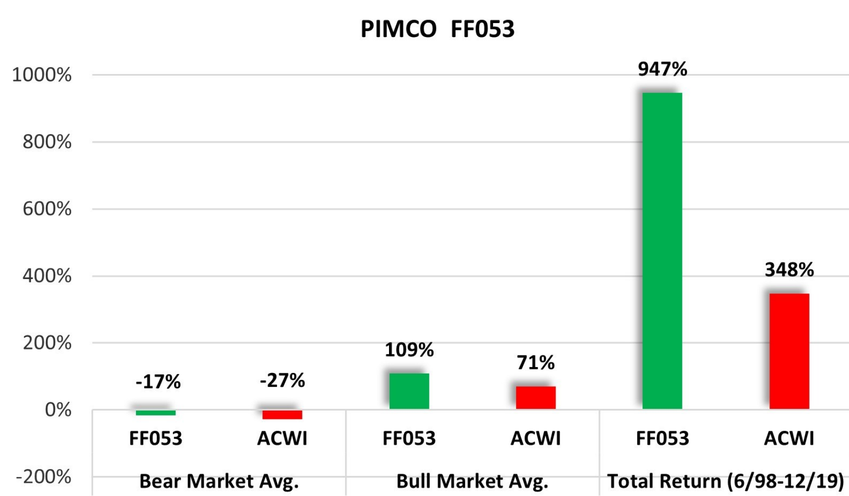
**TRADING ACTIVITY**
Turnover is typically less than 200%. Changes in portfolio positions, if any, are generated at the start of a new quarter with clear BUY, HOLD, or SELL recommendations. A change in the market environment can come mid quarter that would recommend a change, not in positions, but in the investment exposure; fully invested or 50% invested. Market exposure changes are unusual, and have occurred less than once a year on average.

**STIR Research**
**Fund Family Portfolios**

FF050-Mass Financial Services
FF053-Pimco
FF056-American Funds
FF057-Fidelity
FF058-Vanguard
FF059-US Allianz
FF060-Prudential

IF YOU HAVE ANY QUESTIONS ABOUT RESEARCH WITH STIR,
CALL US AT, 970-749-7907
OR VISIT US ONLINE
www.stirresearch.com

### PERFORMANCE DATA
### 3/31/1989 THROUGH 3/31/2021




| Risk / Reward Data 3/31/1989 - 3/31/2021 | Absolute Return | Annualized Return | Cumulative Return | YTD Performance | Less Risk (Beta) | Standard Deviation | 3 Year T.R. | 5 Year T.R. | 10 Year T.R. |
|---|---|---|---|---|---|---|---|---|---|
| FF053 | 26 out of 32 Years | 13.1% | 6419.55% | 0.77% | .65 | 12.86% | 19.34% | 61.88% | 102.41% |
| ACWI | 25 out of 32 Years | 10.8%% | 2509.70% | 2.65% | 1.00 | 15.86% | 44.12% | 88.39% | 144.77% |

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