

# BCM U.S. Sector Rotation CIF

Offered as a Standalone Option for Qualified Plans

## Sector ETFs<sup>†</sup>



Ongoing Quantitative Analysis considers:



Has there been a **change** in the sector's **momentum**?

How is the change occurring? These 3 factors determine the **speed** of the systems reaction time.

**+ Positive Trend = Keep/Buy**



**- Negative Trend = Keep Out/Sell**

- Sectors are owned in **equal weights**
- Ability to **rebalance weekly**
- Sectors have a **maximum equity** buy position of **25%**
- If **3 or fewer** sectors are owned, the portfolio will begin to **raise cash\***
- The portfolio (and allocation) has the ability to go to **100% cash\***

BCM U.S. Sector Rotation CIF is also included in the BCM DynamicBelay™ QDIA Target Date Collective Investment Funds (CIFs). For more information on our strategies, contact your regional consultant or an internal consultant at [salesupport@investbcm.com](mailto:salesupport@investbcm.com) or 844-401-7699.

## About Beaumont Capital Management (BCM)

We help investors participate in bull markets while seeking to protect against large market losses. We are committed to providing a wide range of objective, rules-based investment solutions to advisors, institutions and retail investors. Clients can opt for purely quantitative strategies or portfolios that combine quantitative and fundamental approaches offered as SMAs, CITs or in a '40 Act fund format.

\*If 3 or less sectors are being used, the strategy will reallocate to cash or a similar alternative such as a money market or short duration (up to a 1-3 year) fixed income position at the discretion of the portfolio manager. Not all BCM strategies are available in all formats. From inception to July 2016, investment decisions for applicable BCM strategies were based on the Financials and REIT sectors being combined into one. Due to index changes, these two sectors may be considered separately going forward. All strategies' objectives and goals remain the same. As with all investments, there are associated inherent risks including loss of principal. Diversification does not ensure a profit or guarantee against a loss. Sector investments concentrate in a particular industry and the investments' performance could depend heavily on the performance of that industry and be more volatile than the performance of less concentrated investment options and the market as a whole. Beaumont Financial Partners, LLC DBA Beaumont Capital Management, 250 1st Avenue, Needham, MA 02494 P: 844-401-7699. E: [salesupport@investbcm.com](mailto:salesupport@investbcm.com). Copyright © 2016 Beaumont Financial Partners, LLC. All rights reserved. For Investment Professional Use Only.