



Model Number:
MLGRO

Model Position Changes:
Evaluated Weekly STIR provides timely clear Buy 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

Illustrator Tool Symbols:
(MLGRO vs fix80)
S&P 500 Index & Vanguard Total Bond Market (80%/20% dividends included)

Model Goals:
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).

Market Leaders GROWTH: MLGRO is 80% equity / 20% Equity Income

Over 80% of a portfolios performance can be attributed to its asset allocation. STIR focuses on building a flexible diversified portfolio by analyzing 8 different asset classes to identify the leading asset classes for portfolio inclusion and performance and to avoid the portfolio sapping laggards for exclusion. This is a flexible portfolio that will change its allocations upon changes in the economy and market trends. STIR through quantitative analysis of: 6 domestic style boxes and 2 internationals, is seeking to find the leaders and learning what to avoid. Capital preservation is equally important; during perceived major market declines, reviewed weekly, a defensive allocation of 40% equity / 60% bonds will be employed.

BEST USE OF MLGRO

This model is ideal for investors with a growth objective seeking a flexible diversified asset allocation that changes with the direction of the market and economy.

TRADING ACTIVITY

Typically less than 200%. Changes in portfolio positions, if any, are generated only at the start of a new quarter. However, a change in the STIR Market Environment Indicator (MEI) can come mid quarter that would recommend a change, not in positions, but in the equity investment exposure which could be reduced from 80% to a 40% allocation. Market exposure changes are unusual, and have occurred less than once a year on average.

To contact a STIR Research Representative call or email us sales@stirresearch.com

STIR—970-749-7907
www.stirresearch.com

**STIR Research
Market Leaders Portfolios**

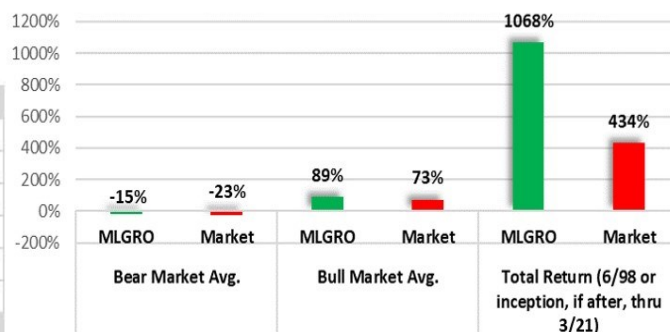
- MLAGR—AGGRESSIVE
- MLGRO—GROWTH
- MLMOD—MODERATE
- MLCON—CONSERVATIVE
- MLROT—ROTATIONAL

**PERFORMANCE DATA
12/31/1999 THROUGH 3/31/2021**

Research Methodology (example)

Universe	RSA (Relative Strength Analysis)	Allocation	IFS Risk	MEI Risk	Bullish
			Management	Management	
Quarterly			Daily	Weekly	
11 Asset Classes 11 ETF Funds	iShares Large Growth	32%			↑
	iShares Large Value	24%			↑
	iShares Mid Value	16%			↑
	iShares Small Value	8%			↓
	Pure S&P 500 Value	12%	↑		
	Pure Mid Cap 400 Value	8%			
80% invested when Bullish, 40% when Bearish					

Market Leaders Growth: MLGRO



Risk / Reward Data 12/31/1995—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.
MLGRO	22 out of 26 Years	10.85%	1617.01%	13.89%	.59	13.77%	48.49%	109.48%	161.80%
ACWI 80%/ Total Bond Market 20%	18 out of 26 Years	8.34%	706.6%	1.63%	.80	12.69%	35.83%	73.98%	123.75%

ACWI, All Country World Index. STIR is intended for a professional audience for informational purposes only and is not a recommendation to buy or sell any security, nor is it intended as specific advice for any individual investors' portfolio. All advice is impersonal investment advice and provided for the exclusive use of our Subscribers. STIR is NOT a registered broker/dealer and should be used by investors who are aware of the risk of investing in the market. Past performance is no guarantee of future results. Data FastTrack. T.R.: Total Return