



**Model Number:**  
MLMOD

**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](http://www.stirresearch.com)

Illustrator Tool Symbols:  
(MLMOD vs fix60)  
S&P 500 Index & Vanguard Total Bond Market (60%/40%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 MODERATE: MLMOD is 60% equity / 40% bond**  
Over 80% of a portfolio's 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 30% equity / 70% bonds will be employed.

**BEST USE OF MLMOD**

This model is ideal for investors with a moderate 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 60% to a 30% allocation. Market exposure changes are unusual, and have occurred less than once a year on average.

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**STIR Research  
Market Leaders Portfolios**

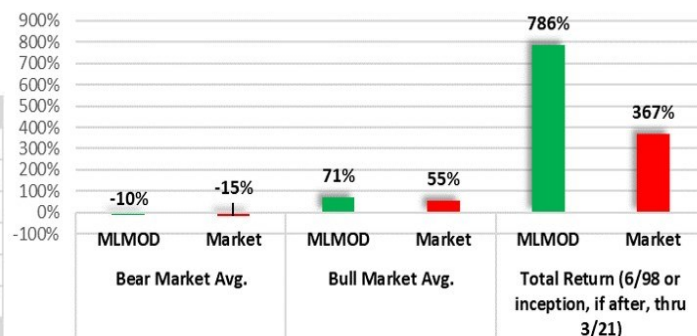
- MLAGR—AGGRESSIVE
- MLGRO—GROWTH
- MLMOD—MODERATE
- MLCON—CONSERVATIVE
- MLROT—ROTATIONAL

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

**Research Methodology (example)**

Universe	RSA (Relative Strength Analysis)	Allocation	IFS Risk Management		MEI Risk Management	
			Quarterly	Daily	Weekly	Bullish
10 Asset Classes 10 ETF Funds	iShares Large Growth	24%			↑	↑
	iShares Large Value	18%			↑	↑
	iShares Mid Value	12%			↑	↑
	iShares Small Value	6%			↑	↑
	Pure S&P 500 Value	24%	↑			↓
	Pure Mid Cap 400 Value	16%				↓
60% invested when Bullish, 30% when Bearish						

**Market Leaders Moderate: MLMOD**



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.
<b>MLMOD</b>	23 out of 26 Years	9.21%	1134.62%	15.77%	.49	11.68%	45.61%	95.86%	133.66%
<b>ACWI 60%/ Total Bond Market 40%</b>	19 out of 26 Years	7.45%	586.8%	.31%	.60	9.52%	30.52%	59.59%	102.66%

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

To obtain full disclosure, please download from [www.stirresearch.com](http://www.stirresearch.com) for more information.