



Model Number
TDROT

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:
(MLROT vs SP-DA)
S&P 500 Index (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).

TARGET DATE ROTATIONAL

MLROT seeks capital appreciation through capital preservation in a broadly diversified portfolio. STIR monitors the performance of a short term Target Date/Life Style Fund (with more bonds & less equities) and a long term Target Date/Life Style Fund (with more equities & less bonds). During a perceived declining market, STIR will rotate into a short term Target Date/Life Style Fund, that will have greater exposure to more defensive bond positions.

BEST USE OF MLROT

This model is ideal for investors seeking growth of capital with less risk, that changes with the direction of the market and economy.

TRADING ACTIVITY

Typically less than 100%. The Target Date/Life Style Funds are monitored weekly utilizing STIR's Market Environment Indicator. Any changes in positions are given to Subscribers in clear and precise language that same day.

ASSET CLASSES

Long Term Target Date Fund +2040, or greater, or an aggressive fixed allocation fund with 80% equity exposure.

Short Term Target Date Fund 2000, or less, or a conservative fixed allocation fund of 80% bonds or more.

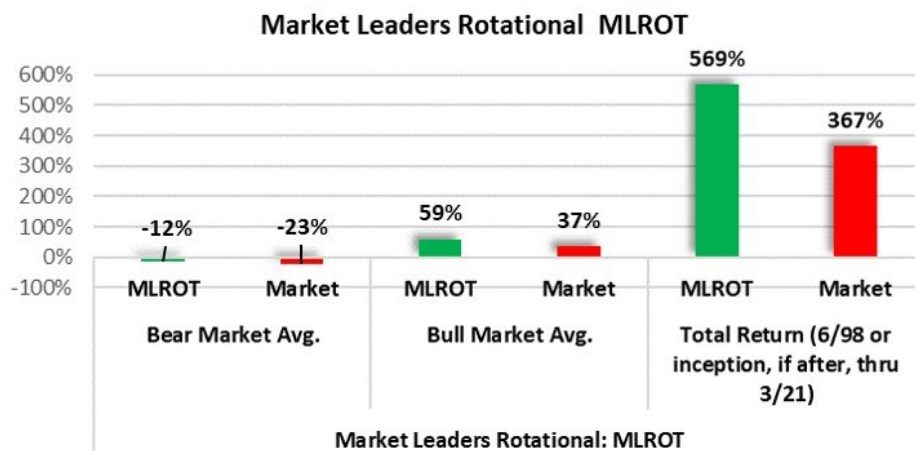
To contact a STIR Research Representative call or email us sales@stirresearch.com

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**STIR Research
Market Leaders Portfolios**

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

PERFORMANCE DATA
12/31/1998 THROUGH 3/31/2021



Risk / Reward Data 12/31/1998-3/31/2021	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.
Target Date Rotational	18 out of 23 Years	8.81%	568.74%	5.75%	.58	11.22%	49.59%	96.72%	147.62%
All Country World Index 80% / Vanguard Total Bond Market 20%	16 out of 23 Years	7.93%	472.60%	1.63%	.82	12.69%	35.83%	73.98%	123.75%

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