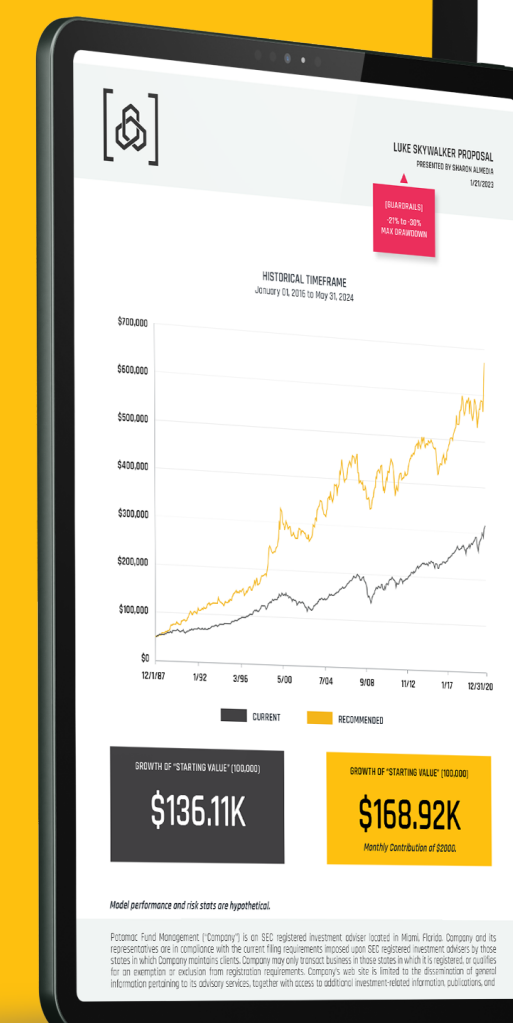
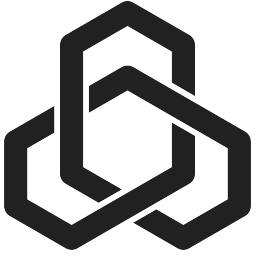




INVESTMENT STRATEGIES
AND SOLUTIONS FOR
FINANCIAL ADVISORS.

BUILT TO CONQUER RISK[®]



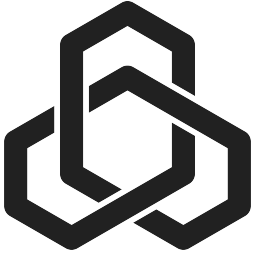


Guardian is a tactical growth strategy with the goal of conservatively participating in equity markets, while avoiding catastrophic bear market losses.

The intersection of quant, momentum, and defense.

GUARDIAN

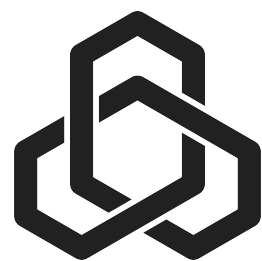




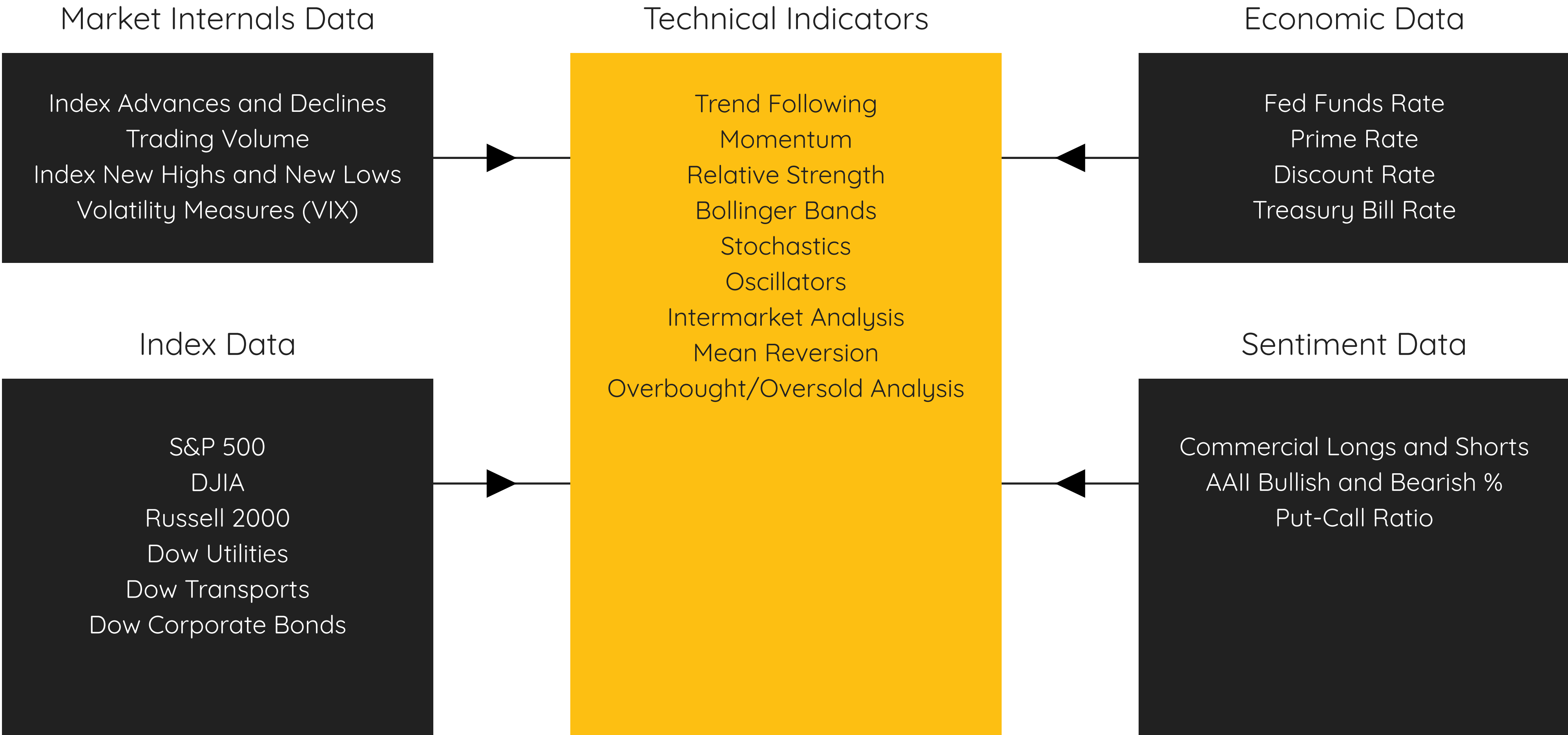
It's just math. Nothing to fear.

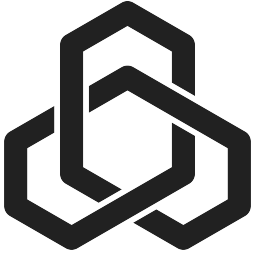
Signals are generated with quant models based on technical analysis.
This eliminates subjective biases and emotions from trading decisions.





Data points and technical indicators.





Intermarket analysis.

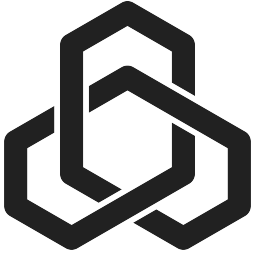
A method of analyzing markets by examining relationships between different asset classes.

Is the bond market smarter than the stock market?

What can commodities tell us about the trend of the stock market?

How do changes in interest rates impact different sectors?

Are transports a leading indicator of the stock market's performance?



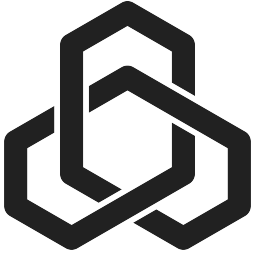
Market internals and sentiment.

Indicators that use data directly from the stock market to assess the odds of a +/- price trend.

Does volume provide confirmation to emerging or existing trends?

Can market breadth spot trend changes?

Can VIX be used as a contrarian indicator?



Uniqueness of our strategy vs. other tactical approaches.

Base Systems

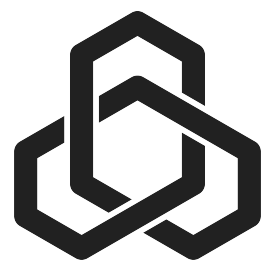
Total market systems that trade infrequently to capture long term trend changes.

Plus Trigger Systems

Capture short-term market inefficiencies that generate high returns while invested.

Equals

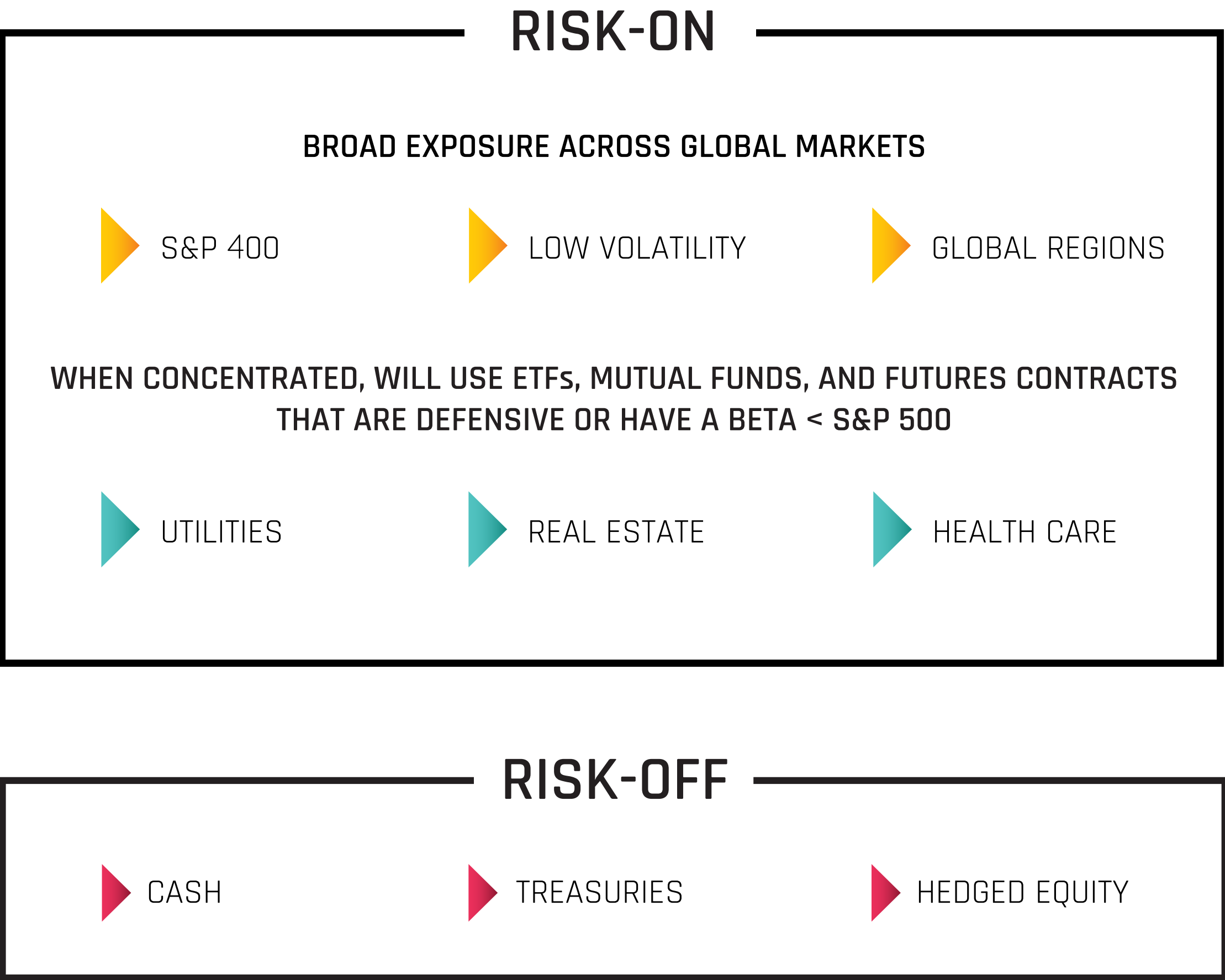
Composite trading result.
Should we be invested?

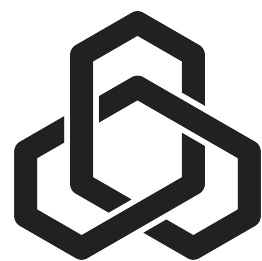


Broad market and defense.

The strategy allocates using a suite of affiliated tactical mutual funds. Guardian will hold a core position that will focus on diversified and defensive equity exposure. The remainder will be allocated among a group of tactical funds.

The underlying funds utilize a combination of dynamic asset allocation and mechanical system trading. Additionally, they employ risk management techniques including the use of hedging, treasuries, and cash positions during adverse market conditions; cash positions could at times be 100%.





A tactical approach to “risk-on.”

Our quant model determines “if” we want to be invested.

The core fund obtains broad index exposure by trading ETFs and/or futures.

Using relative momentum, on a basket of ETFs, the core fund targets a beta less than the S&P 500.

A basket of ETFs are ranked and weighted by the following criteria:

1 Month Return: 25%

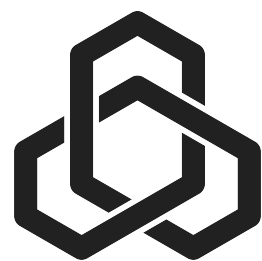
3 Month Return: 12.5%

6 Month Return: 50%

12 Month Return: 12.5%

Guardian “risk-on” opportunities.	
Fund Type	Momentum Score
Convertible Bonds	100%
Hedged Equity	22%
Preferred Stocks	6%
Japanese Equity	0%
Health Care	-3%
Consumer Staples	-10%
Low Volatility Stocks	-13%
Dividend Growth Stocks	-25%

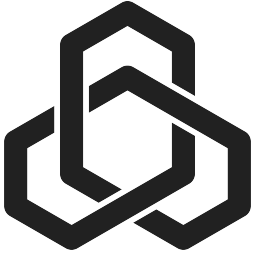
For illustrative purposes.



If you want the S&P 500, just buy the S&P 500!

RISK STATISTICS	
	NET
Max Drawdown	-17.23%
Beta*	0.34
Correlation*	0.66

*Calculated using S&P 500 TR. Please see disclosure. Data since inception 01/01/2000. As of 12/31/2024.



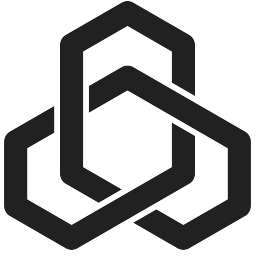
How are advisors using Guardian?

Tactical conservative equity sleeve.

Strategic Fixed Income replacement.

Risk reduction without performance destruction.

DISCLOSURES



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Performance results reflect the composite performance of all fully discretionary portfolios managed by Potomac according to the strategy subject to policies that may require the exclusion of certain accounts. All returns are time-weighted and reflect the reinvestment of dividends and capital gain distributions. Gross performance returns do not reflect the payment of investment advisory fees but reflect the underlying fund management fees, other fund (administrative) expenses, and redemption or 12b1 (fund marketing) fees, if any. Net performance reflects the deduction of a model fee (the highest investment advisory fee charged by Potomac), underlying fund management fees, other fund (administrative) expenses and, if any, redemption or 12b1 (fund marketing) fees. Net of fee returns are calculated using a model fee of 2.5%. The model fee, applied monthly, is the highest fee that may be or has been charged to an investor in this composite. Actual investment advisory fees incurred may vary. Past performance does not guarantee future results. There is no guarantee that any investment strategy or account will be profitable or will avoid loss. Individual investors' objectives, financial situations, their specific instructions, or restrictions on investments, or the time at which an account is opened, or additions are made may result in different trades and returns. Performance for the strategy presented may differ materially (more or less) from the performance of the comparable benchmark and other Potomac investment strategies. Market and economic conditions could change in the future producing materially different returns. Results do not reflect the impact of taxes for taxable accounts or their owners. You cannot invest directly in an index. This presentation is supplemental to the composite report. The Annual GIPS® Report is available upon request. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.