

ABOUT US

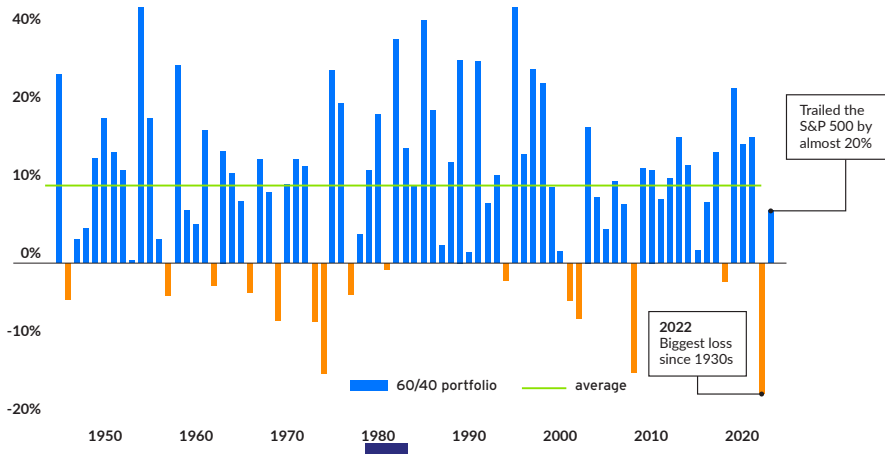
THE EDGETECH DIFFERENCE

Let us introduce ourselves

THE DILEMMA

The most wide-spread portfolio strategies in the market today use something called Modern Portfolio Theory (MPT). MPT maintains that a portfolio should be widely diversified across many assets (usually stocks and bonds) in a predetermined, never-changing allocation. Proponents claim a couple of reasons for this — tax efficiency, risk reduction, cost effectiveness — but in the end it's also one thing — easy for them. Unfortunately though, you as an investor are still subject to the market's whims. Using MPT is like going out to sea with a stable flotation device — you'll keep your head above water but you're still being tossed around by the waves.

2022: Worst 60/40 Portfolio Performance in 100 Years



“
The idea that very smart people with investment skills should have hugely diversified portfolios is madness. It's a very conventional madness. And it's taught in all the business schools. But they're wrong.
 — Charlie Munger
 ”

Source: BofA Global Investment Strategy, Global Financial Data, 2022 is YTD annualized

A 60/40 portfolio — or one comprised of 60% diversified equities and 40% diversified fixed income — has long been considered a gold standard for MPT subscribers. In 2022, this strategy saw its worst performance in a century. Rather than the two parts of the portfolio balancing out risk as intended, they instead fed off of each other and created a tsunami of discomfort for MPT investors.

We're not ready to say that 60/40 portfolios or MPT is dead by any means but we do certainly believe that there are better ways to weather the storms in the market. EdgeTech's modeling system observes changes in the market and recommends actionable insights to advisors. We want to leverage our technology to provide you a more dynamic and focused approach to an ever-changing market.

OUR SOLUTION

Our technology works on your behalf to review market data and use proven mathematical analysis to deliver management insights to your advisor to help them make the right move for you, your risk tolerance and financial goals.

EdgeTech relies on data, not emotions or subjective hunches, to aid in determining what is happening in the market right now. Your advisor can then use this data to make informed choices for your portfolio that aren't influenced by emotional reactions to sensationalized news stories.

The EdgeTech software works tirelessly to keep an eye on the market for you. There are over 250,000 lines of code and it's this power that puts the "edge" in EdgeTech's advantage over having a traditional human-based approach to investing. No emotions, no commission-based ulterior motives, just data-driven mathematical analysis based on the market's history and current movements. EdgeTech helps advisors make the right investment choices customized for your expectations.

We give you the power of technology to help keep your portfolio on track so you can enjoy the lifestyle you deserve.

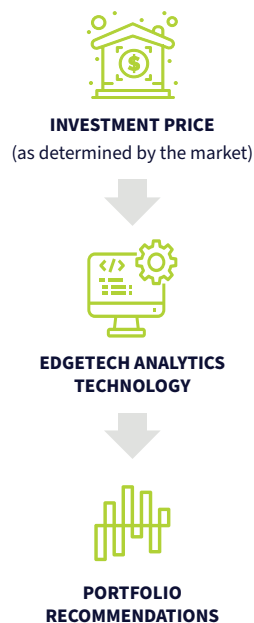
HOW IT WORKS

EdgeTech's technology has no preconceived notions or subjective opinions as to how the market should or will behave. Security prices are black and white and so is our mathematics.

The system tracks price movement of over 3,600 investments and looks for advantageous entry points, while at the same time is calculating exit strategies for each investment. Each signal generated by the technology is a function of how the price (or value) of each investment is moving during any of the various market cycles. The technology seeks to make decisions based on what it observes is happening right now in the market, not on what might be working in the future or what has worked in the past.

Rest easy, you have EdgeTech.

Stop worrying about what the market is doing. EdgeTech has a plan for any type of market activity.



Learn more:

Schedule a demo with one of our advisors to see it in action.



Call: 330-668-2616



Visit: edgetechanalytics.com

The descriptions and examples are for informational purposes only and do not constitute investment advice. All investing involves risk, including the risk of loss of principal. No strategy or technology can guarantee successful results.