GREAT LAKES WEALTH




AGGRESSIVE GROWTH STRATEGY

Around the world, new opportunities emerge every day. Scientific discoveries are made, policy shifts, and cultures transform. The way we consume energy is changing, medicine is advancing, and innovations in engineering are being made. While society transitions, new companies and existing endeavors present themselves. The Aggressive Growth Strategy is aimed to capture these opportunities. We have a "go anywhere, anytime" philosophy that can be customized on a client-by-client basis. This strategy can also hedge when markets become volatile.

Aggressive Growth Strategy: go anywhere, anytime. high risk, potential high return

Objective

Our Aggressive Growth Strategy seeks to produce a greater return than the MSCI Global Index over a complete market cycle. The portfolio has a “go anywhere, anytime” philosophy. For example, it may invest in global stocks, bonds, both long and inverse ETF’s, mutual funds, options, and even cash and cash alternatives. The portfolio may invest in shares of both domestic and foreign companies of any market capitalization, including micro-, small-, mid-, and large-capitalization, but may not exceed 25% in any one equity position.

Key facts

Asset Class/Market Cap:	*Geographic Exposure:*	*Benchmark:*
Equity/All Cap	Global	MSCI World – 100%

Investment strategy

This strategy utilizes our proprietary research, methodology and execution. Our Aggressive Growth Strategy adheres to both a relative and absolute strength investment philosophy coupled with the technical analysis to create both our buy and sell decisions. This portfolio can be tactically in and/or out of the market as warranted. We also believe our active investment disciplines and tactical approach will add to the excess returns over the long-term.

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