

Average time in Market:  
41%



# Utilities Strategy

## Leveraged ETF Market Timing Strategy

### Compound Annual Growth Rate (CAGR)

	<u>Strategy</u>	<u>UTSL</u>	<u>S&amp;P 500</u>
3-Year CAGR	8.95	0.36	11.91
5-Year CAGR	28.92	-7.38	15.17

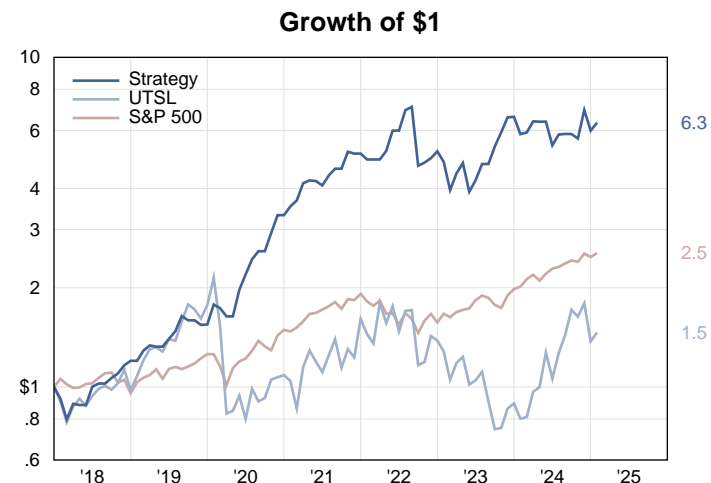
### Risk/Reward Statistics

	<u>Strategy</u>	<u>UTSL</u>	<u>S&amp;P 500</u>
Standard Deviation	37.29	70.04	18.51
Sharpe (Efficiency) Ratio	0.80	0.08	0.76
Beta	0.54	1.79	
Downside Capture Ratio	0.08	2.09	

### Best/Worst Returns

	<u>Strategy</u>	<u>UTSL</u>	<u>S&amp;P 500</u>
Best 3 Months	49.03	61.72	20.54
Worst 3 Months	-30.68	-60.58	-19.60
Best 12 Months	158.57	130.42	56.35
Worst 12 Months	-34.77	-51.43	-18.11
Best 3 Yr Annualized Return	68.72	18.05	26.07
Worst 3 Yr Annualized Return	3.11	-15.81	7.66
Best 5 Yr Annualized Return	41.40	7.21	15.98
Worst 5 Yr Annualized Return	28.91	-7.62	9.42

Best 10 Yr Annualized Return  
Worst 10 Yr Annualized Return



### Annual Returns

	<u>Strategy</u>	<u>UTSL</u>	<u>S&amp;P 500</u>
2018	20.00	-2.25	-4.38
2019	28.93	81.25	31.49
2020	114.59	-38.74	18.40
2021	53.70	48.15	28.71
2022	1.63	-14.05	-18.11
2023	27.25	-35.51	26.29
2024	-9.24	54.24	25.02
2025-01	5.75	6.38	2.78



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Returns presented on this fact card do not include the costs associated with trading ETFs, such as brokerage commissions and other transaction fees. These costs can vary and may impact on the overall performance of the strategy. Investors should consider the impact of trading costs on their investment returns and consult with their broker or financial advisor for more information on transaction costs.

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Investors should carefully review the prospectus and other offering documents of ETFs, consult with their financial advisors, and consider their risk tolerance and investment objectives before investing in leveraged ETFs.

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## **DEFINITIONS**

**Compound Annual Growth Rate (CAGR):** CAGR stands for Compound Annual Growth Rate. It measures the mean annual growth rate of an investment over a specified time longer than one year. **Standard Deviation:** Standard deviation is a measure of an investment's volatility, showing how much its returns vary from the average. **Sharpe Ratio:** **Sharpe Ratio** evaluates investment performance by measuring extra returns per unit of risk. **Beta:** Beta measures how much an investment's returns move in relation to a market index, indicating its relative volatility. **Downside Capture Ratio:** The downside capture ratio quantifies an investment's performance in down markets relative to a benchmark.