

Tempus Advisory Group Researched Series

Tempus Advisory Group



This series of strategies are based upon tactical holdings-based algorithms designed to solve a specific problem, such as driving income or managing a pure bond exposure. The goal is to approach these issues with a strategic design that is more attractive than standard buy-hold-rebalance strategies over a full market cycle.

Models in this Series

Researched Fixed Income
Researched Strategic Income
Researched Balanced Income

Calculation Frequency

Fixed Income and Strategic Income Monthly, on the last business day after the 4:00 PM US Equity Market close

Balanced Income Quarterly, on the last business day after the 4:00 PM US Equity Market close

Key Attributes

Balanced Income has a targeted yield-based objective of 2% above the 10-year US Treasury yield, while Fixed Income and Strategic Income seek to outperform the total return of the US Barclays Aggregate Bond Index with a similar risk profile.

Key Risks

Yield/Dividend bias: Balanced Income may seek yield at the expense of total return.

Benchmark variance: Fixed Income and Strategic Income may own holdings outside of the benchmark holdings.

Expected Annual Changes

Fixed Income: Between three and five per year
Strategic Income: Between six and eight per year
Balanced Income: Four per year

Our mission is

to share our,

expertise,

techniques,

and resources

so clients

may realize

the joy and

peace of mind

that comes

from true

financial freedom!



26 Nesbitt Road, Suite 255
New Castle, PA 16105
p: 724.510.0262
info@tempusadvisory.com
www.tempusadvisory.com