



News Room



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Julex Capital Management to Offer ETF Portfolios With Upside Participation and Downside Protection

Industry Veterans Launch a New Investment Firm to Provide ETF Portfolios for Downside Protection and Consistent Returns in Both Bull and Bear Markets

BOSTON, MA--(Marketwire - March 05, 2013) - Today, [Julex Capital Management, LLC](#), an investment management firm, was launched to deliver institutional-class products and services to RIAs, financial planners, institutions and high net worth and individual clients. Julex develops and manages ETF portfolios that provide downside protection. It offers consistent returns in both bull market and bear market.

The firm's founder, [Dr. Henry Ma](#), CFA, has advanced a proprietary quantitative asset/sector allocation model and 3-step investment process. They aim to preserve capital and reduce risks when the capital markets are weak, and provide attractive returns when the markets are strong. "The past decade has challenged the traditional thesis of 'buy-and-hold,' as seen in the dotcom meltdown, the subprime and the international financial crises," said Dr. Ma. "To generate above-market returns in the ever-volatile investment environment, a better way to manage investment risks is called for -- our research has shown that limiting losses is the key."

Julex offers outcome-oriented and solution-based [dynamic investment strategies](#). They include risk-managed equities, enhanced income, inflation protection, absolute return and global multi-asset portfolio solutions. "Traditional benchmark-centric investment approaches and other alternative investments did not provide enough downside protection and satisfactory results. In the new normal world of the ultralow interest rates and heightened uncertainties, the investors are looking for solutions that promise specific outcomes," said Dr. Ma. "Outcomes are the new alpha."

Dr. Ma was previously a hedge fund manager at Geode Capital, and Director of Quantitative Research at Loomis Sayles and Fortis Investments. Other partners of the firm include Tony Ash, CFA, the former Head of U.S. Portfolio Management at Sun Life Financial, and Brian Phelan, the former Director in institutional sales at PaineWebber and Deutsche Bank. They have combined over 80 years of experience in hedge fund, investment bank, asset management and insurance companies.

Julex products are available as separately managed accounts through numerous distribution platforms. For more information, please visit www.julexcapital.com.

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