



## Upside Participation, Downside Management

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For immediate release

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### **JULEX STRATEGIES ACHIEVE PSN “TOP GUNS” STATUS ACROSS FOUR SEPARATE CATEGORIES FOR Q3 2014**

BOSTON, MA – November 18, 2014 – Julex Capital Management, LLC, a tactical asset allocation firm offering a variety of innovative outcome-oriented investment solutions, today announced that its Dynamic Income and Dynamic Multi-Asset strategies achieved “Top Guns” status within the Informa Investment Solutions' PSN manager ranking database. The Julex Dynamic Income Strategy ranked No. 1 for the most recent year ended September 30, 2014 in the ETF US Fixed Income Category and ranked sixth in the Intermediate Maturity Category. Additionally, the Julex Dynamic Multi-Asset Strategy also earned a “Top Guns” ranking for the most recent year ended September 30, 2014 within the ETF Global Balanced and Global/International Balanced categories.

“Once again, we are delighted to achieve “Top Guns” performance across multiple categories and for multiple products,” says Dr. Henry Ma, CFA, President and Chief Investment Officer of Julex Capital, “This is the fourth time out of the past six quarters where Julex has been awarded “Top Guns” awards. Compared to many larger competitors, our unique [adaptive investment](#) philosophy and three-step investment process really delivered.”

The [Julex Dynamic Income Strategy](#) is a multi asset tactical income strategy that seeks to achieve better returns than the Barclays Aggregate U.S. Bond Index with comparable volatility and peak-to-trough drawdowns. The strategy can invest in exchange traded products (“ETPs”) of income-producing assets including dividend-paying equities, preferred shares, real estate, bank loans, high yield, emerging market, corporate and Treasury bonds. The strategy can be utilized as a good enhancement to fixed income allocation. The 90-day gross yield of the portfolio is 4.75% as of 10/31/2014.

The [Julex Dynamic Multi-Asset Strategy](#) is a multi asset class GTAA strategy that seeks to achieve better returns than a moderate global asset allocation portfolio with lower volatility and lower peak-to-trough drawdowns. The multi asset class strategy can include ETP investments in U.S. and international

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developed market stocks and bonds, as well as gold, energy, commodities, emerging market securities, and real estate.

### **About Julex Capital Management, LLC**

Founded in 2012 by industry veterans and headquartered in Boston, Julex Capital Management, LLC is an independent registered investment advisory firm dedicated to creating innovative solutions with both upside participation and downside management for institutions and individuals. Currently, Julex offers global tactical asset allocation, income, real assets, multi asset, absolute returns products and target risk portfolio solutions through separately managed accounts and sub-advisor/model provider relationships with other investment advisors and institutions. For more information, visit [www.julexcapital.com](http://www.julexcapital.com).

### **About PSN Database**

PSN database is provided by Informa Investment Solutions (IIS) and is the longest-running database in North America. IIS is a leading software and service provider to financial institutions and investment professional. The PSN Top Guns performance rankings are tabulated for thousands of strategies across 58 peer groups through rigorous screenings. It awards the Top Guns status every quarter to the top 5 or top 10 performers within one or more peer groups. In its database, PSN tracks more than 2,000 money management firms and over 12,000 investment products. For more information, visit: [www.informais.com](http://www.informais.com).

<sup>1</sup> Past performance is not indicative of future returns. The risk of loss in investments can be substantial. You should consult your financial advisor and consider carefully whether such investment is suitable for you in light of your financial situation.