

THE ENGINE ROOM—WHAT POWERS (Y)OUR STRATEGIES

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August 6, 2025

Our family does vacations like expeditions—we are travelers, not tourists—linking together multiple destinations, by plane, boat, car, and train. This year was no exception: San Francisco > Frankfurt > Thessaloniki > Ouranoupolis > Mt. Athos (Google it!) > Constantinople (aka Istanbul) > Athens/Piraeus > Ios > Santorini > Rethymno > Chania > Athens > New York > San Francisco—aboard seven planes, five boats, a few cars, and the occasional train.

We have traveled this way for over a decade now, but what struck me this time was something I'd never really paid much attention to before—the remarkable engines that powered it all! From the Boeing® 777's massive General Electric® GE90-115B—the most powerful jet engine ever used on a commercial aircraft—to the four Wärtsilä® LJX 1500 waterjets that propel the Greek *WorldChampion SeaJet* to a blistering 50 knots—one of the fastest ferries in the world—to the Mercury® Racing R400, a V-10 outboard engine packed into an ultra-sleek, compact frame. These are engineering marvels hiding in plain sight.

Which got me thinking—it's time to spotlight the engines that power (y)our investment strategies.

That's right—our CORE, QUAD, FOCAL, and ASTRA strategies are investment vehicles, each driven by a combination of four 'engines'—tightly integrated protocols that combine indicators with decision rules to guide us in the selection, allocation, and trading of each strategy's holdings.

Here's how it works:

In navigating shifting market regimes, CORE and FOCAL rely on our independent assessment of the health of the economy to fine-tune their exposure—ranging from assertive to ultra-conservative, or even all-cash when warranted. In contrast, QUAD adjusts exposure based on our proprietary read of the market's internal functioning.



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Once exposure is calibrated, four engines go to work. Two of these—QL64 and GV64—are engineered to track unfolding market trends, while a third—QU82—aims to amplify them. After years of R&D, we recently introduced Boost DHFM, our most advanced engine yet—purpose-built to capitalize on asset rotation. Boost is designed to detect asset rotation not only across regimes but within them as well. It uses a fractal framework, analyzing patterns across multiple timeframes to identify where capital is moving.

While CORE and QUAD run on the QL64, GV64, and QU82 engines, FOCAL puts all four to work. So does ASTRA—our newest strategy created for tax-advantaged accounts.

We're proud of these four workhorses. They reflect our foundation in quantitative and behavioral finance and embody the findings of our ongoing research. Each engine is continuously tested, carefully refined, and regularly upgraded to keep our strategies market-adaptive, risk-controlled, and tax-aware.

Curious? Schedule a visit to our HQ for an interactive tour of the "engine room."

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