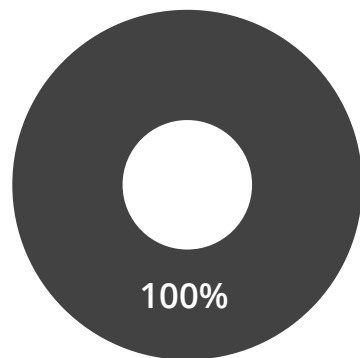


# BCM Sector Rotation Flagship Portfolios

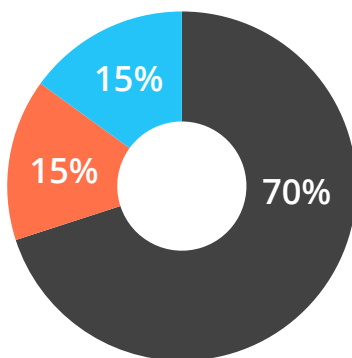


## U.S. Sector Rotation



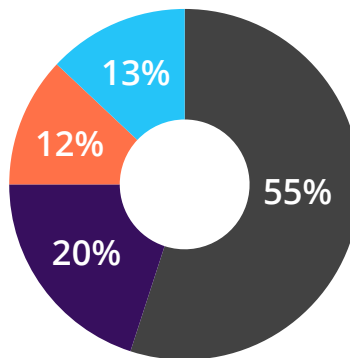
100% U.S. Large Cap Equity

## Diversified Equity



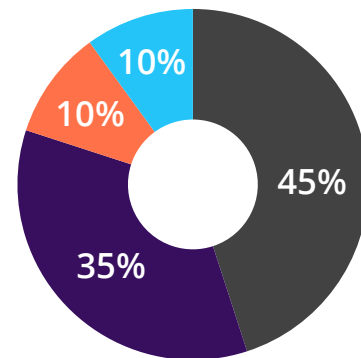
100% Equity

## Growth



80% Equity  
20% Fixed Income

## Moderate Growth



65% Equity  
35% Fixed Income

### U.S. Core Equity

Uses a rules-based sector rotation process to invest in ETFs representing 11 sectors of the S&P 500® Index.

### Global Macro

Fundamentally managed based on the long-term macroeconomic themes of our investment committee. This allocation can "go anywhere."

### High Quality Fixed Income

Fundamentally managed to duration seeking to lower total portfolio volatility. Typically invests in Investment Grade or Government-backed bond ETFs.

### International Equity

Quantitatively driven, fundamentally focused. Typically split 50% Developed and 50% Emerging Markets.

## About AIM

Algorithmic Investment Models (AIM) is an asset manager that uses advanced machine learning technology and behavioral finance principles to develop investment strategies for financial advisors and institutions. The firm's disciplined approach balances growth potential and risk management, aligning with client priorities in fast-moving markets. Supported by a multidisciplinary team that combines innovation and experience, AIM is committed to continuous improvement, delivering solutions designed to meet evolving investment needs. Additionally, the firm has a suite of proprietary quantitative tools and machine learning capabilities that can be used to develop custom research and investment solutions for RIAs and institutional investors.

## Minimums & Fees

**Account Minimum:**  
\$25k-\$100k

**AIM Management Fee:**  
27-50 bps

**All eligible BCM strategies  
are GIPS® verified.**

### Contact AIM:

algomodels.com  
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(844) 401-7699

# The Sector Rotation Investment Process

## Sector ETFs



### Price trend and momentum



1. Volatility of each market sector
2. Rate of change of volatility
3. Volume of trading

These three factors determine the speed of the system's reaction time.

- Negative Trend = Keep Out/Sell



+ Positive Trend = Keep/Buy

- Sectors are owned in equal weights
- Ability to rebalance weekly or monthly
- Sectors have a maximum buy position of 25%
- Each portfolio can go to 100% cash equivalents
- If fewer than 5 sectors are owned, the portfolio will allocate 25% to a broad U.S. Equity ETF
- If 3 or fewer sectors are owned, the portfolio will begin to raise cash equivalents in 25% increments

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Algorithmic Investment Models (AIM) is an SEC registered investment advisor. AIM offers tactical, risk managed, growth strategies using ETFs across multiple asset classes with domestic, international and global exposure.

Algorithmic Investment Models (AIM) was originally created in 2009 as Beaumont Capital Management (BCM), a separate division of Beaumont Financial Partners, LLC. Beaumont Capital Management LLC spun off as its own entity as of 1/2/2020. Algorithmic Investment Models claims compliance with the Global Investment Performance Standards (GIPS®).

Prior to 1/1/2020, AIM was named BCM and was a division of Beaumont Financial Partners, LLC. To obtain a GIPS® compliance presentation, or the composite descriptions for our strategies, contact us through any of the following channels, and the information will be sent to you: (P) (888) 777-0535, [info@algomodels.com](mailto:info@algomodels.com), or by mail to the address provided.

The target allocations shown are buy targets only. Actual allocations will differ due to market fluctuations. Accounts will typically carry a ~2% position in a money market even when a model is "fully" invested. If the system calls for additional "cash" to be raised as a defensive position, a short duration (up to a 1-3 year) bond ETF may be used. Index providers periodically change their security classifications and BCM will analyze the changes and update the research and methodology of the effected strategies accordingly.

Diversification does not ensure a profit or guarantee against a loss. As with all investments, there are associated inherent risks. Sector investments concentrate in a particular industry and the investments' performance could depend heavily on the performance of that industry and be more volatile than the performance of less concentrated investment options and the market as a whole. Foreign securities are subject to interest rate, currency exchange rate, economic, and political risks, all of which are magnified in emerging markets. The risks are particularly significant for ETFs that focus on a single country or region. Fixed Income investments are subject to inflationary, credit, market and interest rate risks.

The Standard & Poor's (S&P) 500® Index is an unmanaged index that tracks the performance of 500 widely held, large-capitalization U.S. stocks. Indices are not managed and do not incur fees or expenses.

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