



PIONEER IN ADAPTIVE INVESTING

## Julex Dynamic Income

achieved Informa Investment Solution's PSN

### TOP GUNS

performer for the 1-year period ended March 31, 2015 in the following category:

### ETF US Fixed Income

BOSTON, MA – May 19, 2015 - Julex Capital Management, LLC, a tactical investment firm offering innovative investment solutions that aims to deliver consistent returns in any market environment, today announced that its Dynamic Income strategy achieved "Top Guns" status within the Informa Investment Solutions' PSN manager ranking database. The Julex Dynamic Income Strategy ranked in the top five for the most recent 1-year period ended March 31, 2015 in the ETF US Fixed Income Category.

"For the sixth time in the last eight quarters, we are once again delighted to achieve "Top Guns" performance for the Julex Dynamic Income strategy," says Dr. Henry Ma, CFA, President and Chief Investment Officer of Julex Capital. "Compared to many larger competitors out there, our unique [adaptive investment philosophy](#) and three-step investment process has continued to deliver. The strategy has proven to perform well in rising rate (during 2013) and falling rate (during 2014) environments, including the falling rate 3-mth/10-yr flattening we have seen during the last 12-months ended March 31, 2015." During the since inception period from October 1, 2012 ended March 31, 2015, the Dynamic Income strategy produced a gross cumulative total return of 15.50% versus the Barclays U.S. Aggregate Bond Index of 5.71%.\*

The [Julex Dynamic Income Strategy](#) is a global 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 is 100% tactical and 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 a fixed income allocation.

#### 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)

\* 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.

## About Julex Capital Management

Founded by industry veterans, Julex Capital Management, LLC is a tactical investment management firm dedicated to creating innovative solutions for institutions, investment advisors and individuals. Julex offers a variety of dynamic multi-asset managed ETF strategies that are designed to deliver consistent returns with low volatility and drawdowns in both bull and bear markets. Its current strategies include equity sector rotation, multi asset, income, real asset, and absolute returns.

### **Adaptive Investment Approach (TM)**

After the great recession in 2008, more and more investors have moved away from "buy-and-hold" to a more tactical approach to portfolio management. Julex Capital Management pioneers an Adaptive Investment Approach to help investors to limit downside risks while participating market upsides. The adaptive investment approach, under which investors can adjust their investments to reflect economic regimes, ongoing market trends or market volatility, has the potential to deliver consistent returns in both bull and bear markets by dynamically positioning in the asset classes perceived to have the best returns. To know more about the approach, please read our [thought leadership piece](#).

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