



PIONEER IN ADAPTIVE INVESTING

## Julex Celebrates Three Year Track Record of Top Performing Dynamic Income Strategy

BOSTON, MA – October 5, 2015 - [Julex Capital Management, LLC](#), an investment firm offering tactical risk-managed investment solutions that aim to minimize the downside losses while preserving the upside potential, today announced that the Julex Dynamic Income Strategy has celebrated its three year anniversary. Since its inception in October 2012, the strategy was ranked a “Top Guns” performer six times by *Informa PSN* in the Intermediate Bond or ETF Fixed Income categories. It was also ranked among “Top Performing Managers” four times in the Intermediate Bond category by *Pension and Investments*.

"We are delighted to be hitting the three year mark at a time when the Fed is about to raise interest rates," says Dr. Henry Ma, CFA, President and Chief Investment Officer of Julex Capital. "The multi asset high income investment approach we are utilizing has the potential to deliver significant excess returns against a traditional bond portfolio, especially in rising interest rates environment. In last three years, the strategy has proven to perform well in both rising rate (during 2013) and falling rate (during 2014) environments. For investors who are seeking both higher income and stability, the Julex Dynamic Income serves as a good complement to fixed income allocation."

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 invests 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. We utilize a unique [Adaptive Investment Approach](#) to position in the high-yielding assets tactically to provide stability. The strategy can be utilized as a good enhancement to a fixed income allocation. Since inception period from October 1, 2012 ended September 30, 2015, the Dynamic Income strategy produced a gross annualized return of 3.8% versus the Barclays U.S. Aggregate Bond Index of 1.6%.\*

### 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 of portfolio management. Julex Capital Management pioneers an Adaptive Investment Approach to help investors 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 potential returns. To know more about this approach, please read our [thought leadership piece – Adaptive Investment Approach](#).

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