



Sterling Global Strategies is NOW Available on



Sterling Global Strategies

is proud to announce that our two most popular strategies, **Sterling Tactical Rotation** and **Sterling Tactical Bond**, are now available on the Envestnet Platform! Through rigorous due diligence and countless hours of work, our team is excited to share our Flagship products with the Envestnet community.

These tactical ETF strategies rotate between broad based fixed income, equity, real estate and commodity asset classes and are industry-unique in their ability to invest 100% in cash and/or cash equivalents during periods of pronounced market weakness. They are designed to potentially perform well during full market cycles as well as bear markets, late cycle, or recessionary environments by valuing cash as an asset class. We are thrilled to offer Financial Advisors who utilize the Envestnet Platform the ability to allocate with us in our efforts attempting to "Create Wealth by Preserving Capital" the slogan here at Sterling Global Strategies.

In conjunction with our Envestnet availability, Sterling Tactical Bond Strategy has received 5 Stars from Morningstar for the 3 year period ended June 30th, 2018 and an overall 4 Star rating, while Sterling Tactical Rotation Strategy received 3 Stars for the 3 year period and an overall 3 Star rating.

We look forward to furthering our impact and footprint in the Investnet community as we build out our offerings on the platform.

For more information, or to speak with us about ways to allocate to our strategies, please contact us at info@sterling-gs.com or call us at 760-603-8881.

Thank you for your continued trust and support!

Take a look out our Strategies below

STERLING GLOBAL STRATEGIES

STERLING TACTICAL ROTATION

December 31, 2016

Description

The Sterling Tactical Rotation strategy is a rules-based global fund that employs an asset allocation strategy across equity, fixed income, and cash. The strategy seeks to outperform the 60% MSCI World / 40% US World Bond index.

Process

The strategy uses a rules-based process to allocate assets across equity, fixed income, and cash based on market conditions.

Asset Classes

- Equity
- Fixed Income
- Cash

Historical Performance

Risk Statistics

	Sterling Tactical Rotation	60% MSCI World / 40% US World Bond
Annualized Return	7.61%	6.26%
Annualized Std Dev	5.91%	5.82%
Alpha	2.31%	0.00%
Beta	1.00	1.00
Correlation	97.28%	98.0%
R Squared	94.67%	96.0%
Up Capture	99.01%	98.0%
Down Capture	95.06%	98.0%
Max Drawdown	-22.27%	-19.85%

Performance

Year	Sterling Tactical Rotation	60% MSCI World / 40% US World Bond
2007	1.76%	0.42%
2008	-16.26%	-13.82%
2009	7.24%	3.89%
2010	10.24%	7.34%
2011	11.81%	12.24%
2012	13.82%	13.82%
2013	18.75%	17.85%

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STERLING GLOBAL STRATEGIES

STERLING TACTICAL BOND

December 31, 2016

Description

The Sterling Tactical Bond strategy is a rules-based global fund that employs an asset allocation strategy across equity, fixed income, and cash. The strategy seeks to outperform the 60% MSCI World / 40% US World Bond index.

Process

The strategy uses a rules-based process to allocate assets across equity, fixed income, and cash based on market conditions.

Asset Classes

- Equity
- Fixed Income
- Cash

Historical Performance

Risk Statistics

	Sterling Tactical Bond	60% MSCI World / 40% US World Bond
Annualized Return	12.4%	10.0%
Annualized Std Dev	8.8%	8.4%
Beta	1.00	1.00
R Squared	94.2%	96.0%
Up Capture	100.0%	100.0%
Down Capture	99.0%	98.0%
Max Drawdown	-14.0%	-14.0%
Max Drawdown Length	12	12
Market In Return	0	0

Performance

Year	Sterling Tactical Bond	60% MSCI World / 40% US World Bond
2007	4.2%	2.8%
2008	-10.2%	-12.2%
2009	5.2%	3.2%
2010	12.2%	10.2%
2011	15.2%	13.2%
2012	18.2%	16.2%

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HOME

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Questions? Contact us today 760-603-8881