

Trendlines Beat Headlines

Trending Report

Data Ending: 2023.02.24



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Member FINRA/SIPC

FORMULAS

Formulaic Trending
Asset Management

EXCHANGE

Turnkey Asset
Management Program

INSURANCE SERVICES

Insurance & Annuity
Distribution

ADVISOR ADVANCEMENT

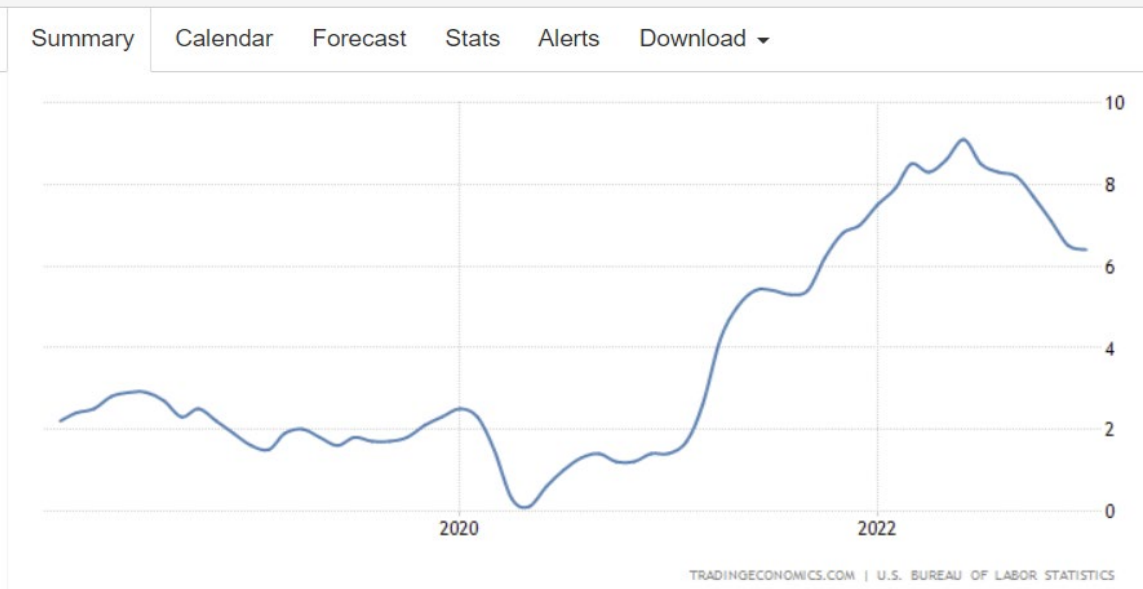
Consulting, Technology
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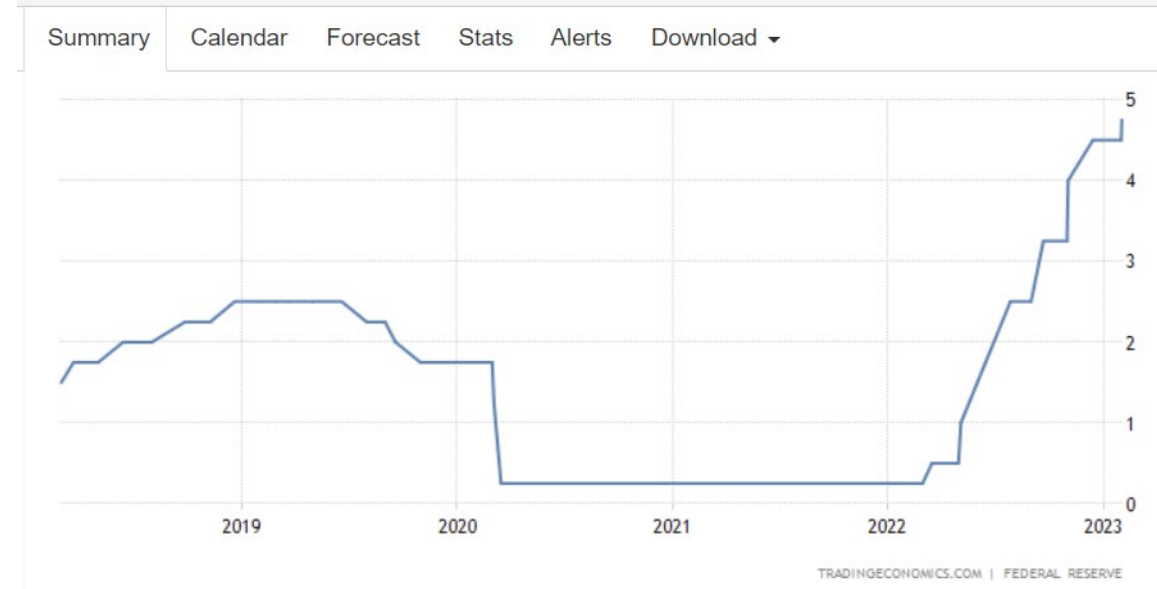


Honor Roll 5-Time Honoree

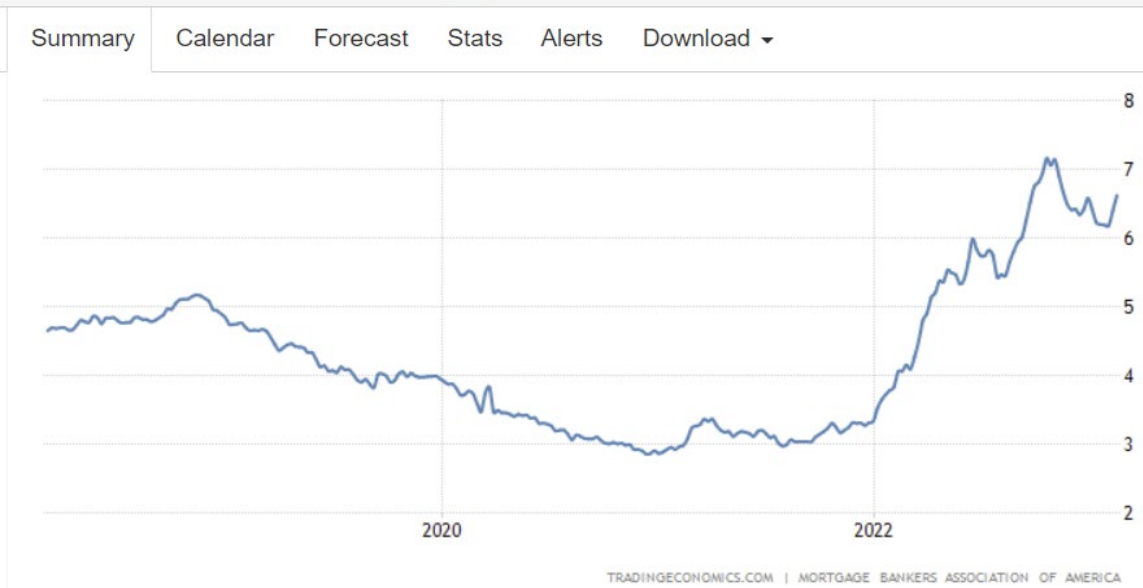
United States Inflation Rate



United States Fed Funds Rate

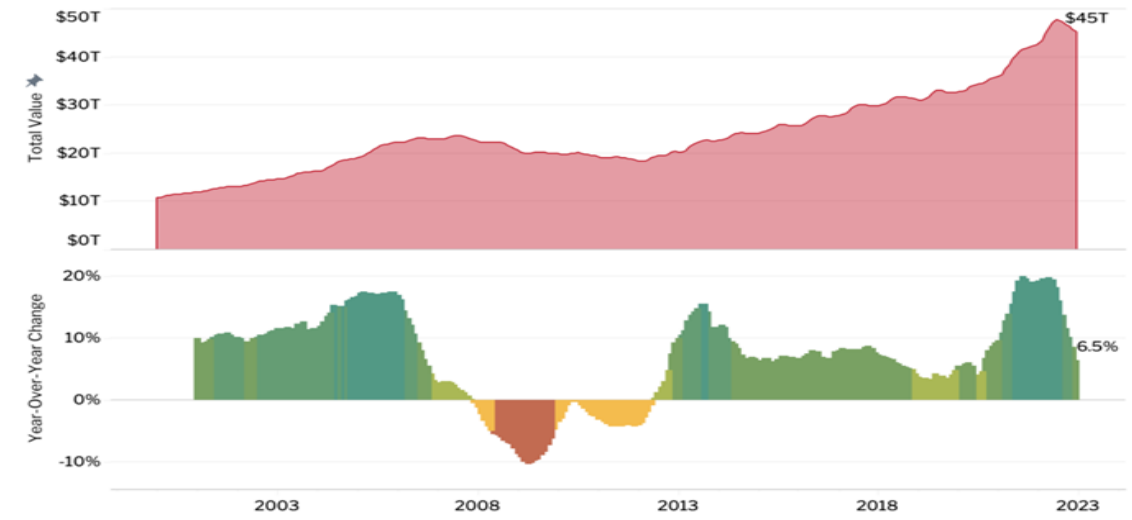


United States MBA 30-Yr Mortgage Rate



U.S. Housing Market Loses \$2.3 Trillion in Value

Total value of U.S. residential real estate and year-over-year change



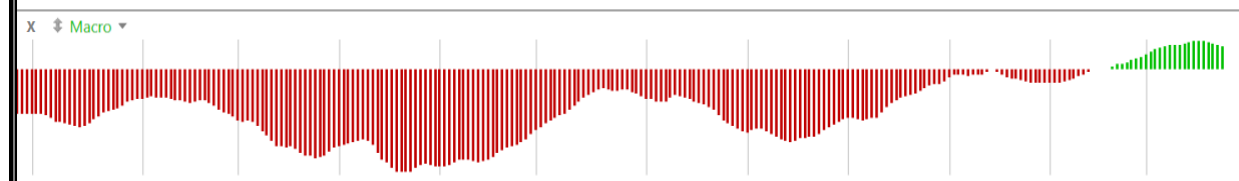
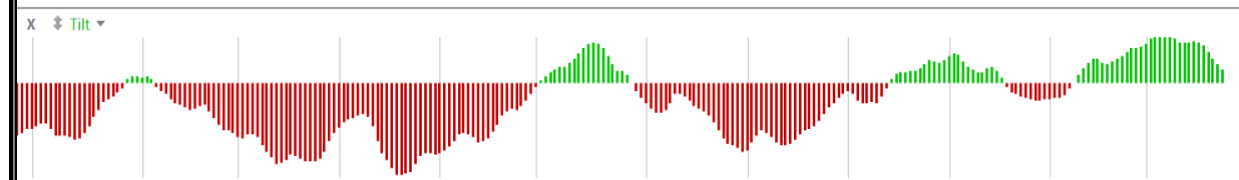
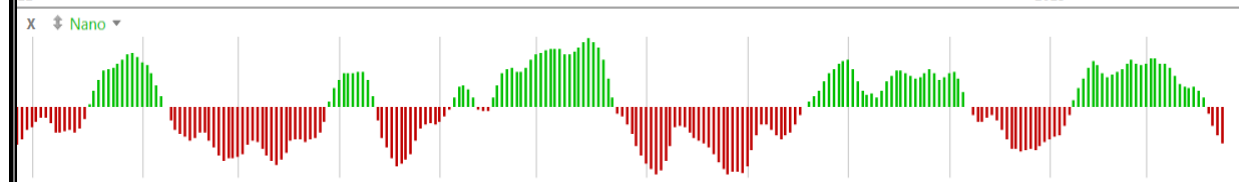
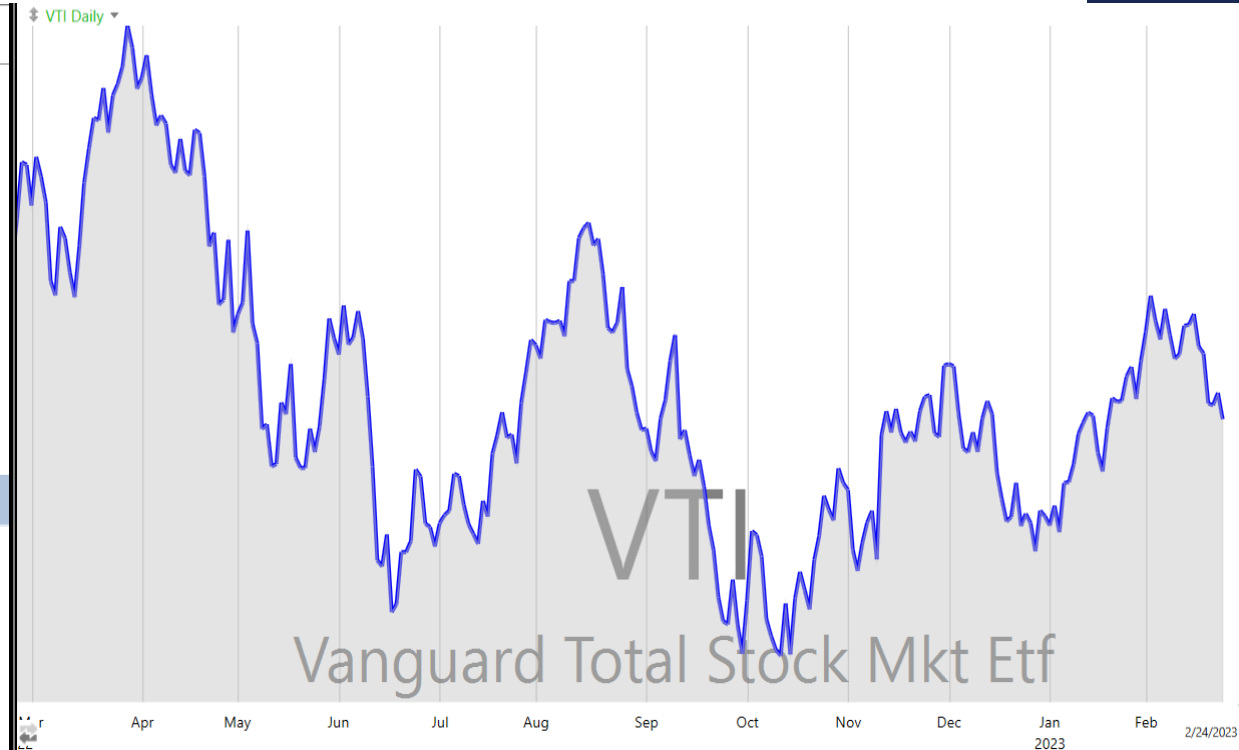
US Capitalization 1-Year Trend

Green = Tilting Bullish

Red = Tilting Bearish



Sym	Company	Macro	Mezzo	Tilt	Micro	Nano
IJS	iShares S&P SmallCap 600 Value ETF	●	●	4.3	●	●
IJJ	iShares S&P MidCap 400 Value ETF	●	●	3.8	●	●
IJH	iShares S&P MidCap 400 Index Fund ETF	●	●	3.6	●	●
IJK	iShares S&P MidCap 400 Growth ETF	●	●	3.4	●	●
IJR	iShares S&P SmallCap 600 Index Fund ETF	●	●	3.3	●	●
QQQ	Invesco QQQTrust Ser 1	●	●	2.8	●	●
IJT	iShares S&P SmallCap 600 Growth ETF	●	●	2.3	●	●
IVE	iShares S&P 500/Barra Value Index Fund ETF	●	●	2.2	●	●
VTI	Vanguard Total Stock Mkt Etf	●	●	1.6	●	●
IVV	iShares S&P 500 Index Fund ETF	●	●	1.3	●	●
OEF	iShares S&P 100 Index Fund ETF	●	●	1.2	●	●
IVW	iShares S&P 500 Growth ETF	●	●	0.1	●	●

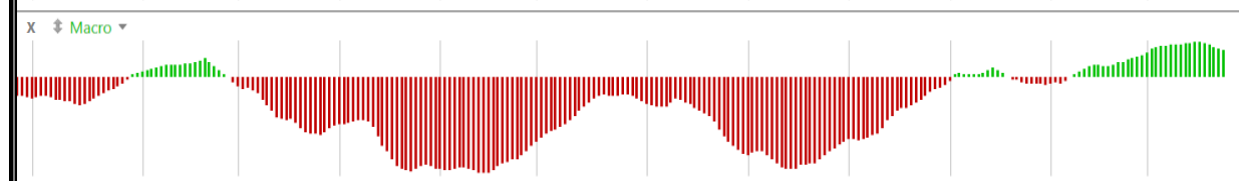
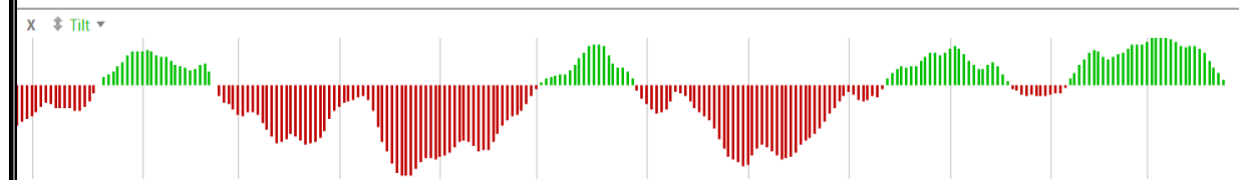
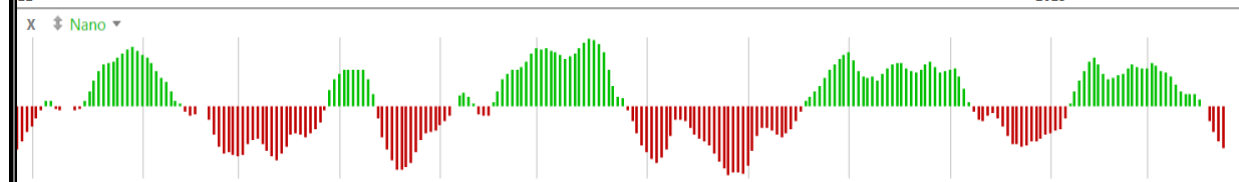
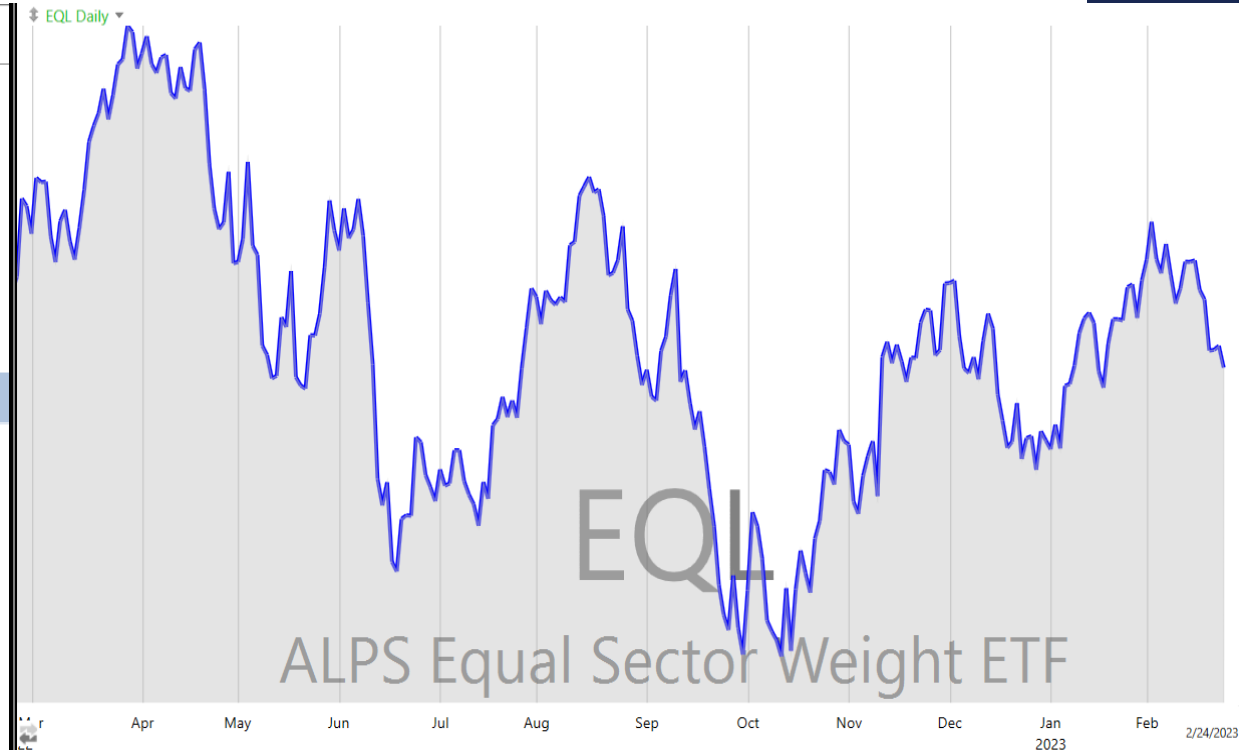


US Sector 1-Year Trend

Green = Tilting Bullish

Red = Tilting Bearish

Sym	Company	Macro	Mezzo	Tilt	Micro	Nano
VGT	Vanguard Information Tech Etf	●	●	3.9	●	●
VIS	Vanguard Industrials Etf	●	●	3.8	●	●
VOX	Vanguard Telecomm Srvs Etf	●	●	3.1	●	●
VFH	Vanguard Financials Etf	●	●	2.9	●	●
VCR	Vanguard Consumer Disc Etf	●	●	2.2	●	●
VAW	Vanguard Materials Etf	●	●	1.9	●	●
EQL	ALPS Equal Sector Weight ETF	●	●	0.5	●	●
VDC	Vanguard Consumer Staples Etf	●	●	-0.2	●	●
VNQ	Vanguard Reit Etf	●	●	-0.3	●	●
VHT	Vanguard Health Care Etf	●	●	-2.8	●	●
VDE	Vanguard Energy Etf	●	●	-3.2	●	●
VPU	Vanguard Utilities Etf	●	●	-4.0	●	●



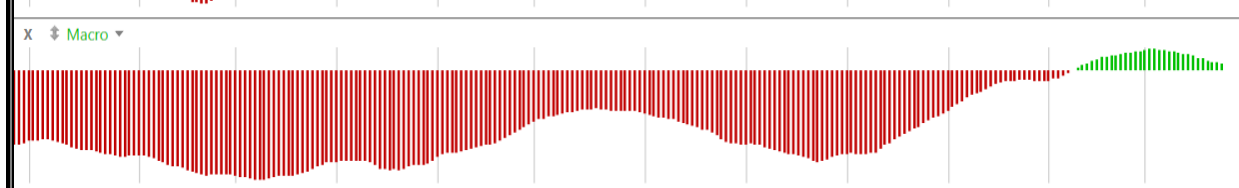
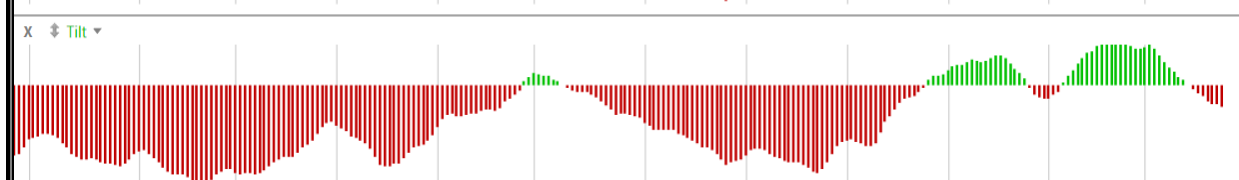
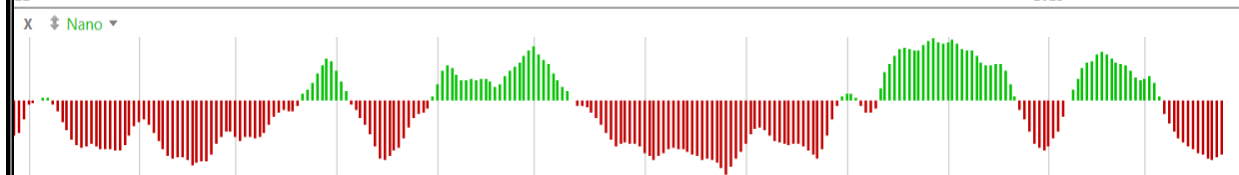
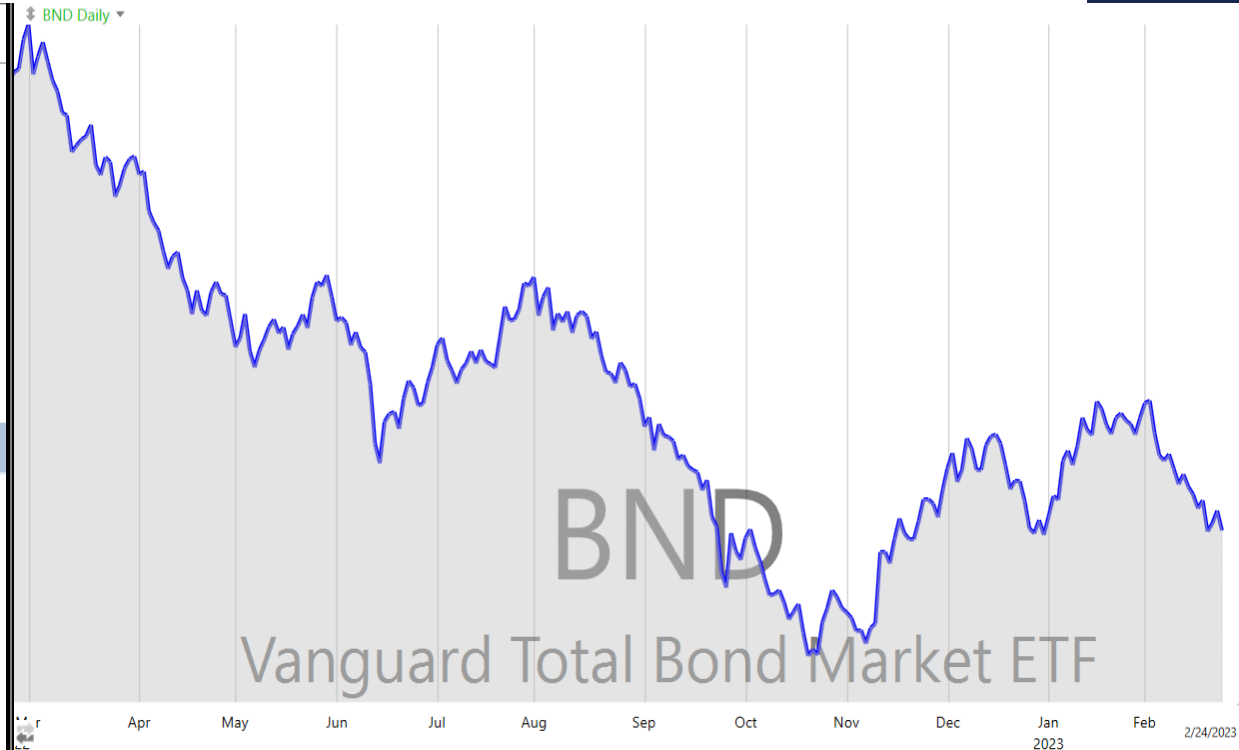
US Bond 1-Year Trend

Green = Tilting Bullish

Red = Tilting Bearish



Sym	Company	Macro	Mezzo	Tilt	Micro	Nano
HYG	iShares IBoxx \$ High Yield Corporate Bond ETF	●	●	-1.2	●	●
VCLT	Vanguard Long-Term Corporate Bond ETF	●	●	-1.6	●	●
VCIT	Vanguard Intermediate-Term Corporate Bond ETF	●	●	-1.8	●	●
LQD	iShares Iboxx \$ Investop Corp Bd	●	●	-1.9	●	●
VCSH	Vanguard Short-Term Corporate Bond ETF	●	●	-2.0	●	●
TLT	iShares Barclays 20+ Year Treasury Bond Fund	●	●	-2.0	●	●
TLH	iShares Barclays 10-20 Year Treasury Bond Fund	●	●	-2.1	●	●
BND	Vanguard Total Bond Market ETF	●	●	-2.3	●	●
GOVT	iShares Barclays U.S. Treasury Bond Fund	●	●	-2.8	●	●
IEI	iShares Barclays 3-7 Year Treasury Bond Fund	●	●	-3.5	●	●
SHY	iShares Barclays 1-3 Year Treasury Bond Fund	●	●	-3.6	●	●
IEF	iShares Barclays 7-10 Year Treasury Bond Fund	●	●	-3.6	●	●



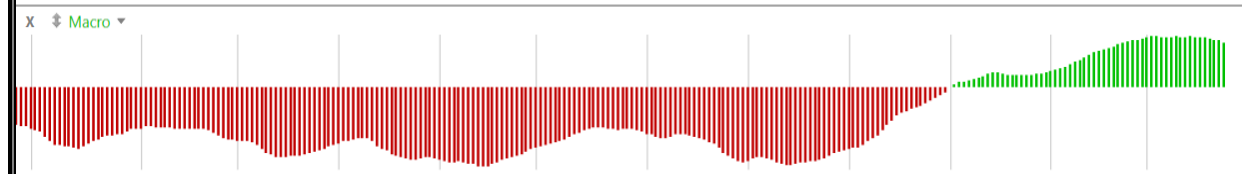
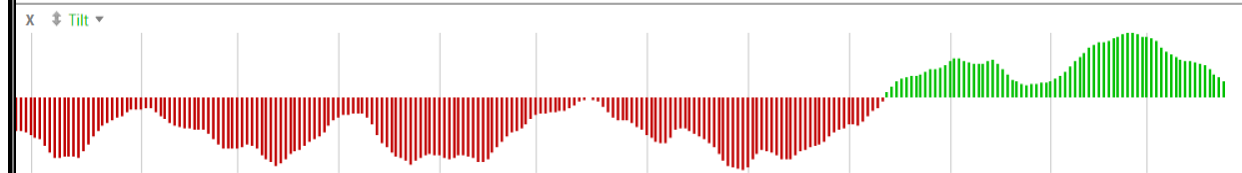
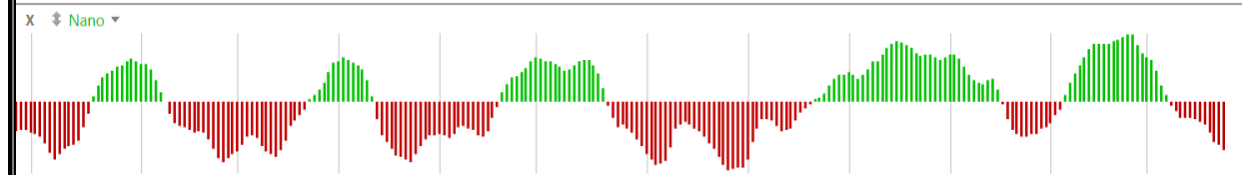
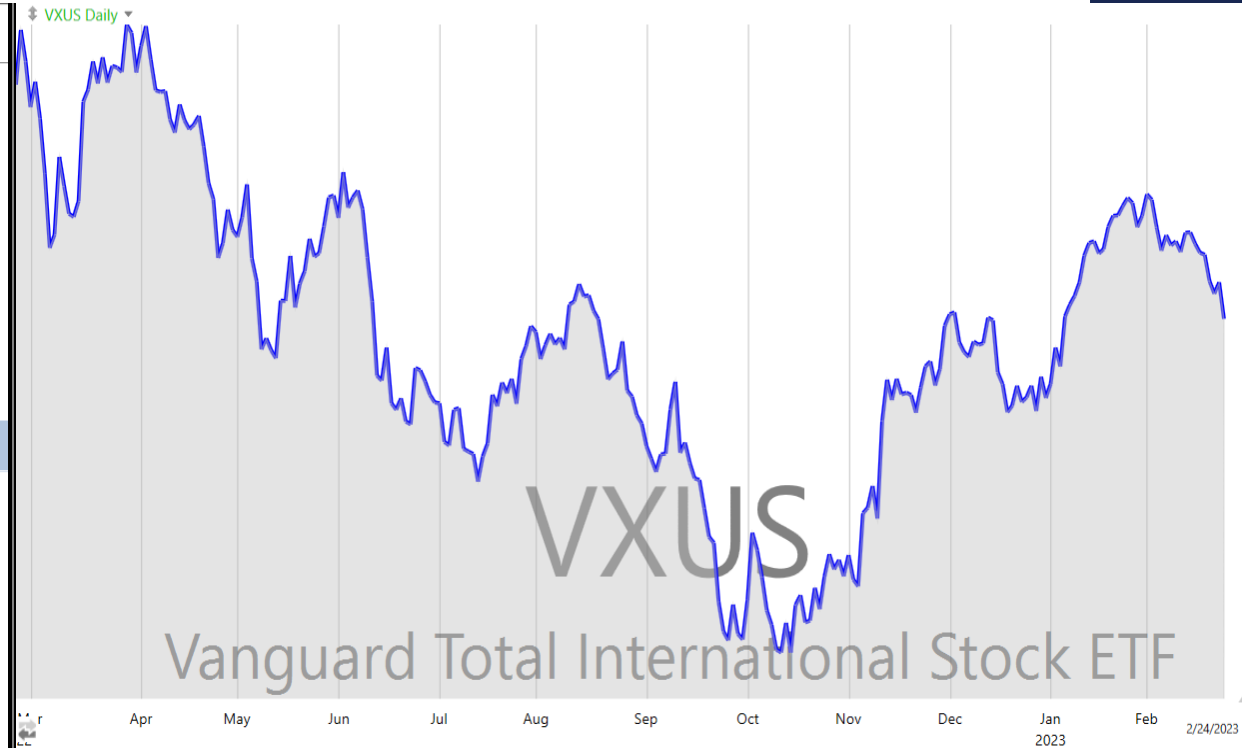
International Equity 1-Year Trend

Green = Tilting Bullish

Red = Tilting Bearish



Sym	Company	Macro	Mezzo	Tilt	Micro	Nano
EZU	iShares MSCI EMU Index Fund ETF	●	●	7.8	●	●
VGK	Vanguard European Etf	●	●	6.7	●	●
EFV	iShares MSCI EAFE Value Index Fund ETF	●	●	5.8	●	●
EFA	iShares MSCI EAFE Index Fund ETF	●	●	5.0	●	●
EFG	iShares MSCI EAFE Growth Index Fund ETF	●	●	4.2	●	●
YIMI	Vanguard International High Dividend Yield ETF	●	●	3.8	●	●
VSS	Vanguard FTSE All-World ex-US Small-Cap ETF	●	●	2.9	●	●
VXUS	Vanguard Total International Stock ETF	●	●	2.7	●	●
VIGI	Vanguard International Dividend Appreciation ETF	●	●	2.3	●	●
VPL	Vanguard Pacific Etf	●	●	1.3	●	●
VWO	Vanguard Emerging Markets ETF	●	●	-0.3	●	●
ILF	iShares S&P Latin America 40 Index Fund ETF	●	●	-0.9	●	●





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