

GROWTH STRATEGIES

Relative Strength Individual Equity Portfolios

Our Relative Strength Individual Equity (RSIE) Portfolios

RSIE GROWTH

Designed for **long-term growth** and **wealth creation**.

RSIE DIVIDEND

Designed for **regular income** with **long-term wealth enhancement**.

Innovation designed to benefit investors in up markets and down.

At NewSquare Capital, we believe the best investments allow investors to pursue growth and dividends, while protecting gains when markets falter. Therefore, we utilized our best thinking to find an effective strategy which seeks to do both.

Importance of Limiting Downside Risk

| Portfolio Loss | Gain Needed to Break-Even |
|----------------|---------------------------|
| -10% | +11% |
| -25% | +33% |
| -50% | +100% |


IN UP MARKETS

When fully invested, the portfolio invests in a diversified set of approximately 20-30 stocks experiencing high investor demand, based on our detailed analysis of market and stock performance trends.


IN DOWN MARKETS

The portfolios use a disciplined approach to protect capital by raising cash in response to data showing deterioration in demand trends.



This disciplined approach is designed to grow wealth during long-term up-markets, while limiting the impact of sustained market losses by preserving capital. The portfolios aim to take the stress out of unpredictable markets and help you maintain focus on long-term investment outcomes.

Our process reveals true market demand

A TWO PRONGED-APPROACH: FUNDAMENTAL ANALYSIS COUPLED WITH RELATIVE STRENGTH

FUNDAMENTAL ANALYSIS is employed to identify leading, fundamentally sound companies. To narrow the focus, Point-and-Figure technical analysis helps us reveal true market demand.

The **RELATIVE STRENGTH methodology**—an established investment approach with a long-term track record—allows us to pivot between wealth accumulation (offense) and wealth preservation (defense) by dynamically tilting toward areas of strong demand.

Diversify your investment strategy



The portfolios provide investors with a unique structure and a disciplined methodology for preserving capital without scaling back opportunities for long-term gains or income. The portfolios themselves are also spread across market sectors, capitalizations, and style boxes to take advantage of diversification as markets adjust.



“At NewSquare, we don’t put our energy into trying to guess why the market is performing as it is. Instead, we listen to the signals the market is giving us, and we respond in a systematic way.”

—RYAN L. KIRK, CFA, HEAD OF PORTFOLIO MANAGEMENT

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