

BCM Moderate Growth Strategy Holders Trade Info

On May 8th BCM Moderate Growth Strategy purchased a ~2% position in an exchange traded fund (ETF) that seeks to track an interesting index, the MSCI All Country World Minimum Volatility Index (ACWV)... what a mouthful!

After researching this fund, it appears to me that the strategist is seeking to mitigate potential volatility in your account by purchasing companies from around the globe that have traditionally been less volatile.

In the past couple of months the strategy has sold pieces of positions in several sectors, purchasing First Trust ISE Water Index Fund (FIW) and moving some assets from Gold to Silver (through purchasing exchange traded funds involving the metals).

Finally, the strategist has moved toward reducing the risk to bond values caused by rising interest rates by purchasing FLOT, the iShares Floating Rate Fund and short-term corporate bonds, funding those purchases by selling EFA, an international index tracking ETF.

As always, please feel free to contact me with questions or concerns.

Regards,

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