

## ETF PM REPORTS PERFORMANCE FOR INVESTABLE BENCHMARKS

**WESTLAKE VILLAGE, CA; April 1, 2020-** ETF Portfolio Management (ETF PM) today reported performance for the investable benchmarks through March 2020. Year-to-date (YTD), the investable benchmark portfolios returned 1% to 9%. The S&P 500 and long-term Treasuries delivered -19% and 22%, respectively.

The [Investable Benchmarks](#) are four passive core portfolios comprised of leading exchange-traded funds (ETFs) that are also explained in our [new book](#). Over the past 10.3 years, we estimate that these strategic core portfolios delivered net annualized returns of 11% to 35%, or total returns of 182% to 2,010%. These efficient portfolios yield between 0.5% and 2.2%, with expense ratios of 0.1% to 1.0%.

### Investable Benchmarks

As of 3/31/20

Performance							
Name	Symbol	YTD 2020	10.3 Year Annualized	10.3 Year Total	Worst Year	Annual Yield	Expense Ratio
Income & Growth	IG	1%	11%	182%	-4%	2.2%	0.09%
Income & Growth 2x	IG 2x	2%	19%	485%	-13%	0.9%	0.93%
Income & Growth 3x	IG 3x	1%	27%	1,053%	-18%	0.7%	1.01%
Income & Tech 3x	IT 3x	9%	35%	2,010%	-49%	0.5%	1.02%
S&P 500	SPY	-19%	11%	184%	-37%	1.8%	0.09%
Long-Term Treasuries	TLT	22%	9%	145%	-22%	2.3%	0.15%
Warren Buffett	WB	-17%	10%	162%	-33%	1.7%	0.10%
David Swensen	eMAC	-14%	6%	89%	-26%	2.6%	0.11%

\* YTD year-to-date. Worst Year data since 2000. Past performance does not guarantee future results.

The Investable Benchmarks are an important starting point for all investors. These efficiently balanced portfolios have 50% in stocks and the other 50% in bonds. In addition, all of the bond allocations are entirely in long-term Treasuries in order to reduce risk, especially in the leveraged versions. In 2017, we added the Income & Tech 3x portfolio (IT 3x) for aggressive growth investors.

### **Absolute Return Strategies**

ETF PM also specializes in disciplined ETF trend following with a focus on hybrid portfolios that combine indexing with trend following. The firm provides a dynamic range of strategies that have repeatedly delivered gains in down markets including the crash of 2008, the flash crash of 2010, the bear market of 2018, and again in the first quarter of 2020.

### **Pledge to Give Back**

In order to partner directly with clients and the community, ETF PM created a Pledge to Give Back. On an annual basis, ETF PM will donate a percentage of each client's advisory fee to provide student scholarships.

Since 2010, the 70 entities supported by ETF PM include 12 Schools (public & private), two YMCAs, 5-Star Theatricals, Because of Hope, Cabrillo Music Theatre, Casa de Amma, Casa Pacifica, Gerson Institute, Hippocrates Health Institute, Khan Academy, Nature Conservancy, Play Conejo, School on Wheels, Team for Kids, Greater Contribution, Turtle Conservancy, Unity Shoppe, and many more.

### **About ETF Portfolio Management**

ETF Portfolio Management (ETF PM) is a revolutionary financial advisory firm specialized in investing with exchange-traded funds. The firm customizes active and passive investment portfolios for each client account. Client accounts may be held at Interactive Brokers, and other custodians may be available upon request.

For more information, visit [www.etfpm.com](http://www.etfpm.com).

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