

## ETF PM REPORTS PERFORMANCE FOR INVESTABLE BENCHMARKS

**WESTLAKE VILLAGE, CA; July 6, 2021-** ETF Portfolio Management (ETF PM) today reported performance for the investable benchmarks through June 2021. Year-to-date (YTD), the investable benchmark portfolios returned 3% to 10%. The S&P 500 rose by 15% and long-term Treasuries fell by 8%.

The [Investable Benchmarks](#) are four passive core portfolios comprised of leading exchange-traded funds (ETFs) that are explained in our [new book](#). Over the past 10.5 years, we estimate that these strategic core portfolios delivered net annualized returns of 11% to 36%, or total returns of 197% to 2,459%. These efficient portfolios yield between 0.2% and 1.6%, with expense ratios of 0.1% to 1.1%.

ETF PM ETF PORTFOLIO MANAGEMENT, LLC		Investable Benchmarks					As of 6/30/21	
Performance								
Name	Symbol	YTD 2021	10.5 Year Annualized	10.5 Year Total	Worst Year	Annual Yield	Expense Ratio	
Income & Growth	IG	3%	11%	197%	-4%	1.6%	0.13%	
Income & Growth 2x	IG 2x	7%	19%	541%	-13%	0.5%	0.97%	
Income & Growth 3x	IG 3x	10%	27%	1,114%	-18%	0.4%	1.01%	
Income & Tech 3x	IT 3x	4%	36%	2,459%	-49%	0.2%	1.06%	
S&P 500	SPY	15%	15%	318%	-37%	1.5%	0.09%	
Long-Term Treasuries	TLT	-8%	7%	100%	-22%	1.6%	0.15%	
Warren Buffett	WB	14%	13%	270%	-33%	1.5%	0.10%	
David Swensen	eMAC	10%	9%	136%	-26%	1.9%	0.18%	

\* YTD year-to-date. Worst Year data since 2000. Past performance can never guarantee future results.

The Investable Benchmarks are an important starting point for all investors. These efficiently balanced portfolios each have roughly half of their exposure in stocks and bonds, and a 2% to 6% allocation to the bitcoin. 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 and the bitcoin exposure was added at year-end 2020.

### **Absolute Return Strategies**

ETF PM also specializes in disciplined ETF trend following with a focus on multi-strategy portfolios that combine indexing with trend following. The firm provides a dynamic range of solutions with active components 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 Investable Benchmark Grants to students.

Since 2010, the 16 individual students and 69 community entities supported by ETF PM include Te'yanah O., Jericho C., 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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