

## ETF PM REPORTS PERFORMANCE FOR INVESTABLE BENCHMARKS

**WESTLAKE VILLAGE, CA; July 3, 2022-** ETF Portfolio Management (ETF PM) today reported performance for the investable benchmarks through June 2022. Year-to-date, the investable benchmark portfolios fell by 22% to 64%. The S&P 500 lost 20% and Long-term Treasuries fell by 22%.

The [Investable Benchmarks](#) are four passive core portfolios comprised of leading exchange-traded funds (ETFs) that are explained in our [book](#). Over the past 10.5 years, we estimate that these strategic core portfolios delivered net annualized returns of 7% to 22%, or total returns of 113% to 674%. These efficient portfolios yield between 0.1% and 1.7%, with expense ratios of 0.1% to 1.1%.

### Investable Benchmarks

As of 6/30/22

Performance							
Name	Symbol	YTD 6/30/22	10.5 Year Annualized	10.5 Year Total	Worst Year	Annual Yield	Expense Ratio
Income & Growth	IG	-22%	7%	113%	-4%	1.7%	0.13%
Income & Growth 2x	IG 2x	-41%	12%	227%	-13%	0.1%	0.97%
Income & Growth 3x	IG 3x	-56%	15%	353%	-18%	0.1%	1.02%
Income & Tech 3x	IT 3x	-64%	22%	674%	-49%	0.1%	1.06%
S&P 500	SPY	-20%	14%	266%	-37%	1.3%	0.09%
Long-Term Treasuries	TLT	-22%	2%	21%	-22%	1.7%	0.15%
Warren Buffett	WB	-18%	12%	229%	-33%	1.3%	0.10%
David Swensen	eMAC	-17%	7%	103%	-26%	2.3%	0.10%

\* 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 in cryptocurrencies. In addition, the bond allocations are entirely in long-term Treasuries to reduce risk. In 2017, we added the Income & Tech 3x portfolio (IT 3x) for aggressive growth investors and cryptocurrency exposure was added at year-end 2020 and 2021.

### **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 difficult down markets.

### **Pledge to Give Back**

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 31 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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