

ETF PM REPORTS PERFORMANCE FOR INVESTABLE BENCHMARKS

WESTLAKE VILLAGE, CA; December 30, 2023- ETF Portfolio Management (ETF PM) today reported performance for the investable benchmarks through year-end 2023. For the full year, the investable benchmark portfolios returned 21% to 106%. The S&P 500 and Long-term Treasuries delivered 26% and 3%, respectively.

ETF PM ETF PORTFOLIO MANAGEMENT, LLC		Investable Benchmarks					As of 12/31/23	
Performance								
Name	Symbol	Full-Year 2023	10 Year Annualized	10 Year Total	Worst Year	Annual Yield	Expense Ratio	
Income & Growth	IG	21%	7%	104%	-26%	2.6%	0.12%	
Income & Growth 2x	IG 2x	33%	10%	165%	-49%	1.8%	0.97%	
Income & Growth 3x	IG 3x	45%	11%	196%	-66%	2.2%	1.01%	
Income & Tech 3x	IT 3x	106%	19%	452%	-76%	2.3%	1.03%	
S&P 500	SPY	26%	12%	209%	-37%	1.4%	0.09%	
Long-Term Treasuries	TLT	3%	2%	23%	-31%	3.6%	0.15%	
Warren Buffett	WB	24%	11%	182%	-33%	1.4%	0.10%	
David Swensen	eMAC	14%	6%	81%	-26%	2.8%	0.09%	

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

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 years, we estimate that these strategic core portfolios delivered net annualized returns of 7% to 19% or total returns of 104% to 452%. These efficient portfolios yield between 1.8% and 2.6%, with expense ratios of 0.1% to 1.0%.

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.

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.

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