By blending both active and passive investment styles, the Kingsview Investment Management (KIM) Multi-Strategy risk-based allocations aim to provide investors the most optimal characteristics of both active and passive investing. Depending on an investor’s goals, our investment team methodically combines the best features of both our established strategic and dynamic programs to arrive at the desired portfolio solution.

**OPPOSITES ATTRACT**

Kingsview Investment Management believes that active, opportunistic solutions require a strong underlying methodology to provide the highest potential value. Flexible, but opportunistic, allocation adjustments are designed to create uncorrelated return profiles to traditional indices and lower standard deviation in the process.

Kingsview Investment Management also believes that a passive, strategic perspective paired with periodic rebalancing will result in the possibility to achieve superior risk-adjusted returns versus an underlying benchmark.

A combination of active and passive investments brings the best characteristics of both strategies in one portfolio. These portfolios may be appropriate for a variety of investor objectives and risk profiles.

### PORTFOLIO PROCESS

An “Active & Passive” approach has been widely adopted and accepted by the investing community. The idea is to apply diversified risk exposure to the foundation of an investor’s portfolio and incorporate satellite investments that either compliment or hedge the strategic foundation throughout various market cycles.

The Kingsview Investment Management Multi-Strategy portfolios deploys an “Active & Passive” approach by engaging portfolio processes of 4 KIM Portfolios:

- **PASSIVE**
  - **TRADITIONAL ASSET ALLOCATION**
    - Diversified asset class exposure aimed at providing strategic, low cost risk mitigation
  - **ALTERNATIVE FIXED INCOME**
    - Uncorrelated bond exposure aimed at hedging traditional bond pitfalls associated with rising rates or credit risk

- **ACTIVE**
  - **VOLATILITY CAPITALIZATION**
    - Opportunistic rebalancing stages are targeted in the portfolio based on underperforming and outperforming areas of the market
  - **EQUITY ENHANCEMENT**
    - Active approach to stock selection that favors fundamental analysis of individual company strength

---

INVESTMENTS@KINGSVIEW.COM | 312.870.6701
MULTI-STRATEGY PORTFOLIO SERIES
ACTIVE & PASSIVE - A COMPREHENSIVE SOLUTION

EFFICIENT FRONTIER OF MULTI-STRATEGY PORTFOLIOS
For illustrative purposes only

POTENTIAL RETURN

POTENTIAL RISK

TYPICAL TARGET ALLOCATION
As of 3/31/2021. Subject to change without notice.

<table>
<thead>
<tr>
<th></th>
<th>Conservative</th>
<th>Moderate Conservative</th>
<th>Balanced</th>
<th>Moderate Aggressive</th>
<th>Aggressive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CASH</strong></td>
<td>2.00%</td>
<td>2.00%</td>
<td>2.00%</td>
<td>2.00%</td>
<td>2.00%</td>
</tr>
<tr>
<td><strong>EQUITY</strong></td>
<td>10.00%</td>
<td>30.00%</td>
<td>50.00%</td>
<td>70.00%</td>
<td>90.00%</td>
</tr>
<tr>
<td><strong>FIXED INCOME</strong></td>
<td>88.00%</td>
<td>68.00%</td>
<td>48.00%</td>
<td>28.00%</td>
<td>8.00%</td>
</tr>
</tbody>
</table>

For illustrative purposes only

Kingsview Wealth Management (“KWM”) is an investment adviser registered with the Securities and Exchange Commission (“SEC”). Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies. Investments involve risk and unless otherwise stated, are not guaranteed.

Kingsview Investment Management (“KIM”) is the internal portfolio management group of KWM. KIM asset management services are offered to KWM clients through KWM IARs. KIM asset management services are also offered to non KWM clients and unaffiliated advisors through model leases, solicitor agreements and model trading agreements. KWM clients utilizing asset management services provided by KIM will incur charges in addition to the KWM advisory fee.

This material has been prepared by Kingsview Wealth Management, LLC. It is not, and should not, be regarded as investment advice or as a recommendation regarding any particular security or course of action. Opinions expressed herein are current opinions as of the date appearing in this material only. All investments entail risks. There is no guarantee that investment strategies will achieve the desired results under all market conditions and each investor should evaluate their ability to invest for the long term. This information does not address individual situations and should not be construed or viewed as any typed of individual or group recommendation. Be sure to first consult with a qualified financial adviser, tax professional, and/or legal counsel before implementing any securities, investments, or investment strategies discussed.