



# EWM'S ACTIVE STOCK PORTFOLIO

*Companies You Know*

*In House Active Management*

*Diligent Research*



**PLANNING CENTERED**

*Attractive allocation yield*

*Established companies*

*Familiar names*



**FUNDAMENTALLY BASED**



*Earnings analyses*



*Financial ratios*



*Company valuations*



**TECHNICALLY FOCUSED**

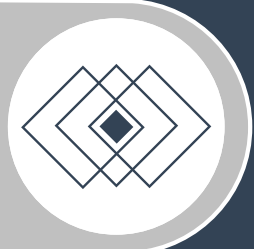
*Proprietary Scans*



*Indicators and Oscillators*



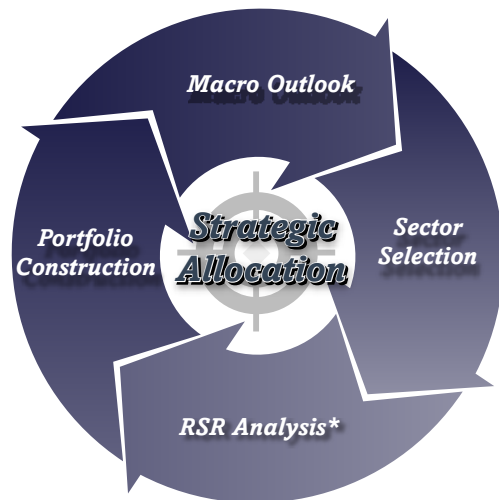
*Candle Chart Analyses*



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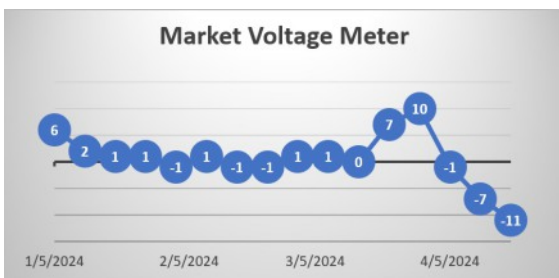
## Stock Selection Process

Our Stock Selection Process features both a daily and weekly review. These processes are both disciplined and active. We use our process to target a Strategic Allocation for 12-18 months; however, market conditions may dictate the need for adjustments to our holdings.



### Macro Outlook

- Analyze broader markets and economy
- Determine current market cycle
- Gauge market risk



### Sector Selection

- 11 equity sectors
- Proprietary process
- Highlights areas of out-performance



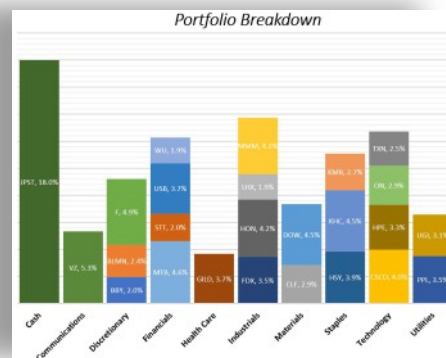
### RSR Analysis

- Plan fit
- Fundamental scanning
- Technical setup

Planning	Fundamental	Technical
Dividend Yield	Price to Book	Point & Figure Charts
Price History	Price to Cash Flow	Monthly MACD
Name Recognition	Current Ratio	Monthly Stochastics
Average Volume	Debt to Equity	Moving Averages
Morningstar Rating	Return on Assets	RRG Charts
	Return on Equity	Directional Position
	Price to Earnings Growth	

### Portfolio Construction

- Overweight high-ranking sectors
- Hold highly ranked RSR securities
- Adjust based on complete analysis



\***Relative Strength Rating** - 3 pronged ranking system that tests the planning, fundamental, and technical strength of an individual stock.

**Important Disclosures:** EWM is not affiliated or endorsed by any company mentioned herein. This information is for educational use only and is in no way intended to be interpreted as investment advice. Different types of investments involve varying degrees of risk. All investment strategies have the potential for profit or loss.