



TCR – supporting active managers to get the most out of their strategies

Capturing medium term (6-to-12+ months window) is key to delivering superior returns on a consistent basis.

Trendrating fills a critical intelligence gap. Trends allocation / distribution analysis offers a new set of metrics to enrich investment strategies and maximize returns.

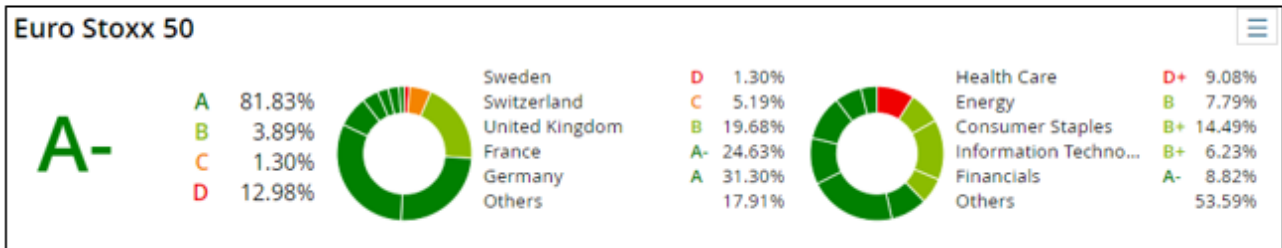
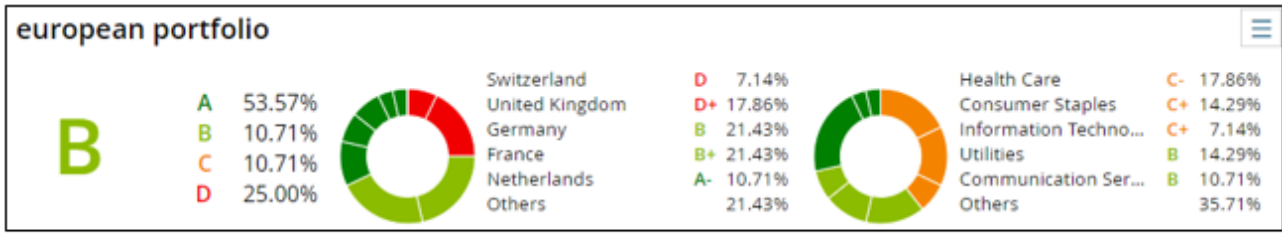
A complement to any investment approach that enables a better synchronization with price trends in every investment universe, profiting from the increasing performance dispersion.

The performance dispersion is a remarkable opportunity for active managers and advisors.

Example-the dispersion of performance for the year 2020:

STOXX Europe 600 Performance*		S&P 500 Performance*	
Index	-3.90%	Index	+16%
Top 25%	+61%	Top 25%	+110%
Bottom 25%	-28%	Bottom 25%	-17%

BEAT THE BENCHMARK. analyze the “trends allocation” and the resulting rating of your portfolio against the benchmark (TCR comparative analysis). Adjust the exposure and raise the portfolio rating to beat the index. Make trends work for you. Get the trends allocation right.



MAXIMIZE YOUR RETURNS. manage risks by monitoring the rating across portfolios (individual portfolios TCR). Identify portfolios with a rating below **B**, as they present high risks of overexposure to stocks in a bear trend.


Portfolio Monitoring		
Name	TCR ▲	AB%
Account 121	C+	45.78%
Account 122	B-	53.42%
health care selected b...	B-	62.50%
Account 120	B ↗	62.50%
European portfolio	B	67.86%
Global Large Cap	B	70.73%
high dividend portfolio	B	66.67%
international growth 1	B	66.67%
STOXX Europe 600	B+	79.35%
SXXP	B+	79.36%
US Mid Cap	B+	79.41%
Euro Stoxx 50	A-	88.32%
S&P 500	A-	92.93%
SPX	A-	92.93%
tech portfolio	A-	88.00%
US value portfolio	A-	92.00%

MEASURE THE HEALTH OF A MARKET, assess the real “health” in any market. The higher the “aggregated trends rating” (TCR) the broader is the percentage of rising stocks and the stronger is the positive trend. The lower the rating the weaker is the overall picture.

Developed Markets - Europe & Middle East Micro Small Mid Large

TCR A-	Stocks 349 <small>Mkt. Cap. 13.15T</small>	Upgrades 14 4.01% <small>Last 20 working days</small>
------------------	---	--

Downgrades 10 2.87% <small>Last 20 working days</small>	AB% 86.17%	CD% 13.83%
--	----------------------	----------------------

 Germany Micro Small Mid Large

TCR B+	Stocks 317 <small>Mkt. Cap. 2.42T</small>	Upgrades 28 8.83% <small>Last 20 working days</small>
------------------	--	--

Downgrades 6 1.89% <small>Last 20 working days</small>	AB% 84.87%	CD% 15.13%
---	----------------------	----------------------

MEASURE AND COMPARE THE STRENGTH ACROSS SECTORS. Analyze the TCR across sectors , compare the rating and optimize your selection and allocation . Capture the rotation across sectors with an objective, pragmatic methodology that tracks the money flow.

Name	TCR	▲	Stocks	AB%	CD%
Health Care	B		809	73.77%	26.23%
Utilities	B		82	70.00%	30.00%
Consumer Staples	B+		129	78.69%	21.31%
Energy	B+		164	80.89%	19.10%
Communication Services	A-		153	90.00%	10.00%
Consumer Discretionary	A-		414	94.33%	5.68%
Information Technology	A-		491	93.26%	6.74%
Materials	A-		210	86.00%	14.00%
Real Estate	A-		198	86.01%	13.99%
Financials	A		635	95.78%	4.22%
Industrials	A		476	95.21%	4.79%

Whatever your investment approach is – Make Trends Work For You

Rating trends is a must have to capture the money flow and profit from performance dispersion

Contact us at info@trendrating.net or visit www.trendrating.com to learn more

Important Information: The evaluations, rankings and information provided by Trendrating (the “Services”) are provided solely for the use of finance professionals (the “Users”) who have been issued a license to use the Services by Trendrating and who, by nature of their status as investment professions understand, or are expected to understand, the complexity of finance products, the functioning of the markets and the risks inherent in them. The Services are not offered for use by persons not employed or actively working as professionals in the finance and investment industry. The Services are to be used entirely at the risk of the Users. Included in the Services are forward-looking statements that are based on observations, assumptions and calculations that reflect Trendrating’s expectations. Forward-looking statements are subject to numerous risks and uncertainties that could cause actual results to materially differ from those expectations. The Services are not intended to constitute a recommendation of any specific security or financial product and are to be implemented solely in conjunction with or as part of a complete investment evaluation conducted by the Users. Under no circumstances shall Trendrating, its officers, directors, employees or agents be liable for any damages, lost profits or investment losses that result in any way from use of the Services or any interruptions, errors or delays in the Services. **Trendrating S.A. © 2013-2020. All rights reserved.**

LONDON

Trendrating Ltd
 Octagon Point – 5 Cheapside
 London, EC2V 6AA
 United Kingdom

BOSTON

Trendrating
 51 Melcher Street
 Boston, MA 02210
 USA

LUGANO

Trendrating SA
 Via Cantonale 19
 CH-6900 Lugano
 Switzerland