S&P 500®

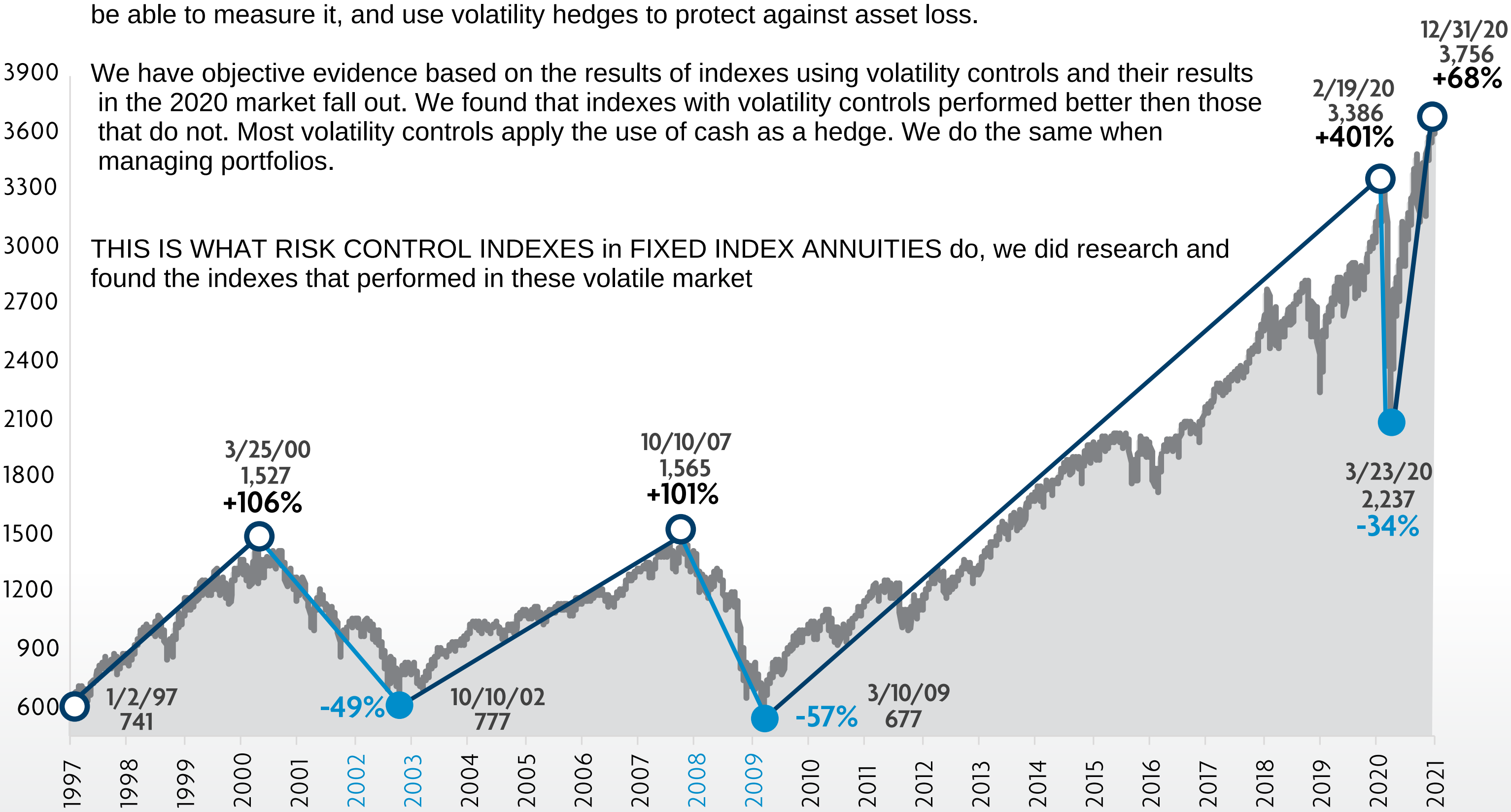
performance history

Retire on your terms – not when the market dictates

We learned during the market crash of 2008, 2009, that portfolio diversification does not provide the hedge against asset lose we were expecting. We did learn we need to understand volatility, be able to measure it, and use volatility hedges to protect against asset loss.

We have objective evidence based on the results of indexes using volatility controls and their results in the 2020 market fall out. We found that indexes with volatility controls performed better then those that do not. Most volatility controls apply the use of cash as a hedge. We do the same when managing portfolios.

THIS IS WHAT RISK CONTROL INDEXES in FIXED INDEX ANNUITIES do, we did research and found the indexes that performed in these volatile market



Source for chart: https://finance.yahoo.com/quote/%5EGSPC/history?p=%5EGSPC