

# Amplified Alpha

**Better Analytics.  
Better Tools.  
Better Investing.**

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**Dallas, Texas**

**Beverly Hills, California**

Past performance is not indicative of future results. Always consult with your tax and legal professionals before making any investment. For more information on Amplified Alpha, please see FINRA BrokerCheck.

*The traditional “balanced” investment portfolio was designed prior to the existence of the internet. While it still works well as a core investment approach, a more innovative approach is now possible.*

*Access to additional investment choices, along with the availability of vast amounts of data, allows for better analytics and greater investment diversity. In turn, this enables better risk management and the potential for improved returns.*

We don't pick stocks, time the market, use high-frequency trading, or use margin. We use simple, contemporary tools in a sophisticated way that can produce superior results.

## ***How does Amplified Alpha cater to your needs?***

### **Safety**

*"I want to participate in market returns, but can't stomach big drops in my portfolio's value."*

Amplified Alpha does not just give you a "risk number" like most investment advisors and money managers. We show you how your specific strategy would have performed in the past (including the dot-com bubble and the 2008 financial crisis), demonstrating the potential risk and returns of your customized portfolio versus traditional approaches.

### **High Returns**

*"I need to grow my investments aggressively to reach my goals, without taking excessive risk."*

Amplified Alpha can achieve significantly higher long-term returns than traditional approaches, while still managing risk.

### **Tax Efficiency**

*"I'm trying to grow my nest egg, but taxes eat away too much of my returns."*

With Amplified Alpha, you can have a high-performing portfolio that is also nearly perfectly tax efficient. Our strategies do not rely upon trading stocks and incur very little short-term capital gains.

### **Cash Needs**

*"I need to grow my investments, but I also have large specific expenses ahead that inhibit my ability to invest in illiquid or risk-bearing assets."*

Amplified Alpha can help achieve above-normal returns while minimizing risk, all while allowing for significant cash reserves. Be secure knowing that we achieve this without margin borrowing.

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# What makes Amplified Alpha portfolios special?



## SAFETY

We utilize risk management techniques to significantly reduce long-term exposure to major market downturns.



## AMPLIFICATION

Risk management allows for maximizing potential returns without increasing risk.



## EFFICIENCY

Avoid mutual fund "turnover," high fund fees, trading tax burdens, and other inhibitors of investing success.



## TESTED

A "risk number" does not show how much you may gain or lose in various market cycles. Our 25+ year backtest takes the mystery out of the risks and rewards of your unique investment strategy.

To contact us, meet our team,  
or learn more about what we can do for you,  
please visit [amplifiedalpha.com](http://amplifiedalpha.com)

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# Amplified Alpha A LP (Fund A) is a hedge fund open to Qualified Clients seeking aggressive returns with actively managed risk.

## Our goals for Limited Partners include:



### **25+ Year Backtest**

- Average annual return to Limited Partners of approximately 20%
- 2X the return of a typical 60% stock/40% bond portfolio (the benchmark portfolio)
- Average annual term risk of loss approximately equal to that of the benchmark
- Significantly reduced drawdowns during major market downturns (the dot-com bubble, 2008 financial crisis, COVID-19 bear market, etc.)



### **3+ Year Live Test (2019-2022)**

- Average annual return for Limited Partners of over 30%
- Average annual efficiency versus backtest > 100%

Note: Fund A is highly correlated to stock and bond markets. It does not seek to be a “hedge” against traditional market swings.

# AMPLIFIED ALPHA FUND A



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## TARGETED RETURN

The target average annual return for Limited Partners is 2X a benchmark stock/bond portfolio (60% SPY TR/40% AGG TR).



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## MANAGED RISK

The target risk level is equal to that of the benchmark 60/40 portfolio for any annual period.



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## MANAGED LEVERAGE

Leverage is achieved via established ETFs and ETNs. Risk management is achieved through the application of our proprietary algorithm. The fund has zero margin call exposure.



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## QUALIFIED CLIENTS

There are no Management Fees, almost no expenses for Limited Partners, and performance incentives only above a high benchmark. As such, Fund A is only open to Qualified Clients.