

Announcing the Portfolio Design Contest Results

Dec 23, 2013

Superb Portfolio Designs Were Submitted

We have selected three spectacular Portfolios, from among many, as champions in these categories:

- 1) **Lowest Drawdown**
- 2) **Most Impressive Ride**
- 3) **Highest [Score]x[Safety]**

Please join me in congratulating their creators for their spectacular achievements, and thanking them for generously sharing their high performance Portfolio design skills with others. As with the Strategy Hall of Fame page, I expect the [Model Portfolios page](#) will not only be of tremendous help to others just getting started, but will also act as a knowledge base for extending the portfolio design skills of anyone willing to learn from and build on the shoulders of champions who have stood tall.

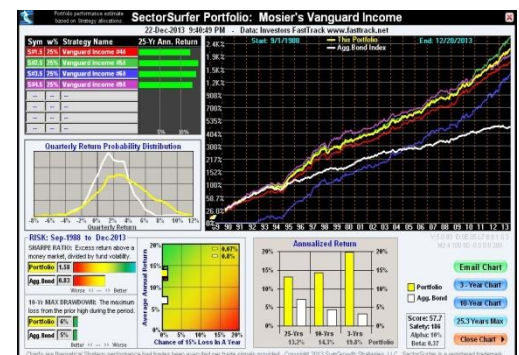
I present to you the amazing Portfolio Design Champions!

★ Mosier's Vanguard Income Portfolio — Lowest Drawdown ★

This risk-averse, conservative portfolio is comprised of Vanguard mutual funds with emphasis on preservation of capital and steady income. The portfolio had 'one losing year in 2000 (-.23%)' and just five fractional or single-digit trading losses since 1988. For those who recall the chilling reality of losing a large portion of "diversified" retirement funds during the market meltdowns, this portfolio is designed to provide the ultimate in safety as a safe harbor during inevitable market storms.



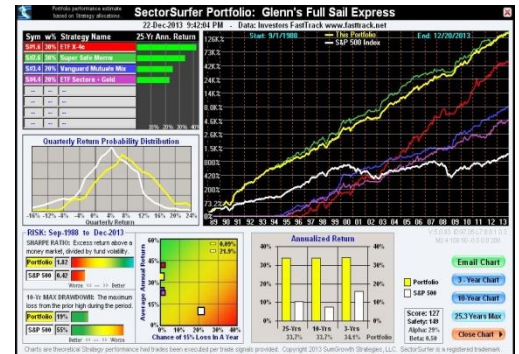
Les Mosier



Click Chart to See Portfolio Details

★ Glenn's Full Sail Express Portfolio — Most Impressive Ride ★

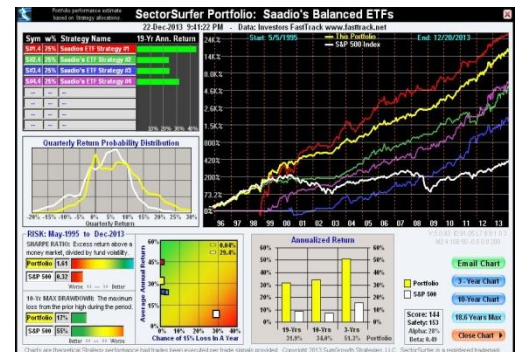
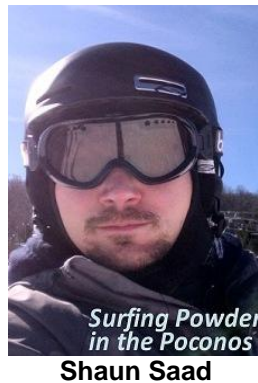
My portfolio design goals were to maximize Sharpe ratio, keep drawdown under 20%, and maintain annual returns over 30%. The results are: a Sharpe ratio of 1.82, max drawdown of 19%, annual returns over 30%, and no losing years. H.O.F. data was downloaded and sorted by Sharpe ratio, Safety Score, and Max Drawdown to establish candidate strategies, which were then all run through FWPT and optimized using Advanced Options features. I'm sure there's room for further improvement.



Click Chart to See Portfolio Details

★ Saadio's Balanced ETFs Portfolio — Highest [Score]x[Safety] ★

This portfolio utilizes four ETF Strategies, each optimized for Safety and Score. All 48 ETFs are different and the portfolio utilizes a minimal number of leveraged ETFs because they are considered to be among the most misunderstood financial products by many professionals - they are rebalanced daily, require active management and are exposed to price erosion as a result. However, as this portfolio demonstrates, judicious use of a few leveraged ETFs can usefully improve overall risk/reward performance.



Click Chart to See Portfolio Details

★ Portfolio Honorable Mention Awards ★

The portfolios listed below all receive strong honorable mentions as additional examples of portfolio design excellence, each exhibiting performance any of us would be quite satisfied with. I encourage you to briefly review each of them to soak up additional ideas and insight they offer which may be useful. The portfolio names each have hyper links to their respective web pages. You can also start at the [Model Portfolios page](#) where you will find a short summary of each.

Portfolio Honorable Mention Awards

Portfolio: [Mosier's Vanguard Growth](#)

Creator: Les Mosier

Portfolio: [C.Y.A. Compliant ETFs](#)

Creator: Joseph William

Portfolio: [Paul's Sky High Stocks](#)

Creator: Paul Coan

Portfolio: [Rob's Aggressive Mix](#)

Creator: Rob McCollough

Portfolio: [Will's Hi-Return, Lo-Risk](#)

Creator: Will Morrison

Portfolio: [Gary's Mixed Assets](#)

Creator: Gary Bakker

Portfolio: [Mark Juds' IRA](#)

Creator: Mark Juds

Again, a big thanks to all who have offered up their best ideas to share with others.

Happy Holidays to all.
Surf Well and Prosper in the New Year.



Scott Juds
President & Chief SectorSurfer
SumGrowth Strategies, LLC
www.SumGrowth.com

