RULES BASED INVESTMENT DISCIPLINE (RBID)

A quantitative approach to asset allocation

Markets are volatile. They fluctuate. They go up, down, and sideways. Long-term investing can help mitigate some of this inherent risk. But what if you don't have that luxury? What if the milestones in your life don't neatly align to market cycles?

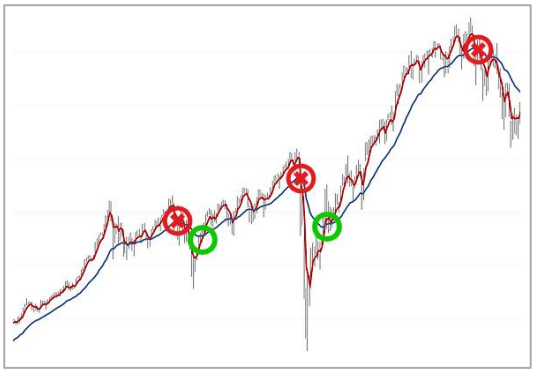
Traditional investment wisdom suggests allocating amongst various asset classes is your best bet to avoid market drawdowns, since different investments will perform better than others each year. The same asset classes rarely stay on top very long. At Reveille we ask the obvious question:

In difficult market environments, wouldn't it make more sense to NOT be fully invested and move to cash?

The challenge, of course, is having a reliable, repeatable process for determining when it makes sense to be invested, and when you should be on the sidelines. At Reveille, we call this process our Rules Based Investment Discipline or RBID.

Process Over Prediction

RBID seeks to identify inflection points in market trends within each asset class and produces buy or sell signals as new trends emerge. Importantly, we never attempt to buy a market cycle low, nor sell a market cycle high. We do not attempt to predict the direction of financial markets. Rather, our goal is to participate in broader market trends.



Representation of RBID process using the Dow Jones Industrial Average (DJIA) - 2017-2022.

Putting it All Together

While RBID tells us when we want to participate in certain portions of the market, it does not inform what we buy, or what investment strategy is best for you. Every client's journey with Reveille starts with a custom financial plan, and all investments are chosen based on an in-depth intra-market analysis.

Financial plan leads to a diversified allocation.

RBID helps determine trend in each asset class.

Trend drives "on" or "off" decision.

Appropriate investment is chosen for "on" asset classes.

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