



*World's first ETF-based portfolio management strategy*

## **LARGE CAP CORE STRATEGY (“LCC”)**

KCM's LCC strategy has been cited by some as the first actively managed portfolio strategy built solely around ETFs. KCM's LCC Strategy combines sector and large company oriented ETFs into a single, coordinated portfolio designed to provide our clients:

- Constant exposure to well known large cap stocks
- Active management
- Tax-efficiency
- Liquidity
- Risk reduction and substantial diversification

### **PORTFOLIO MANAGEMENT PROCESS**

KCM employs a combination of macro-economic, quantitative, and technical tools to evaluate the ETFs that are employed in the strategy. On a quarterly basis, our process establishes the weights for each ETF to be held in your portfolio. Intra-quarter, our process may generate signals to make adjustments in the initial weightings. KCM believes that its systematic, disciplined, and consistent process limits risk and maintains appropriate diversification.

Portfolios can be expected to follow the total return track of the S&P 500 Index, have a high statistical correlation, exhibit financial characteristics similar to, and a dividend yield approximating that of the S&P 500 Index benchmark. This strategy can also build cash reserves when KCM believes it is prudent to do so.

Since inception, the strategy has generated gross, total returns consistent with its investment objective.

Contact us for more information as well as the LCC performance history:

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