

# A FIRM FOCUSED ON GROWTH

There is no question that, over time, the equity markets have proven rewarding. At times though, these same markets can be volatile and challenging for investors, advisors and money managers. The past several years have been successful for investors, but turbulence could creep back into the investment markets at any time. In times like these, you have to ask yourself and your advisor the tough questions about your investment portfolio to ensure you are partnering with investment professionals who share a common interest – growing your assets!

Gradient Investments, LLC is a fee-only investment manager that provides unique portfolio strategies, actively manages risk and consistently performs in good times and in bad.

The approach Gradient Investments brings to portfolio design and management is singular in the industry – and it is no longer a secret. This philosophy is attracting new clients and industry attention.

## NATIONALLY RECOGNIZED

Gradient Investments recently ranked 166<sup>th</sup> in Financial Advisor Magazine's 2020 Annual RIA Ranking in the August 2020 issue.

## NET NEW ACCOUNTS

A measure of how many clients are opening new accounts with Gradient Investments.

**TOP 1%** GRADIENT INVESTMENTS RANKS  
25<sup>TH</sup> OUT OF 1,949 RIA FIRMS\*

## CHANGE IN TOTAL ASSETS UNDER MANAGEMENT

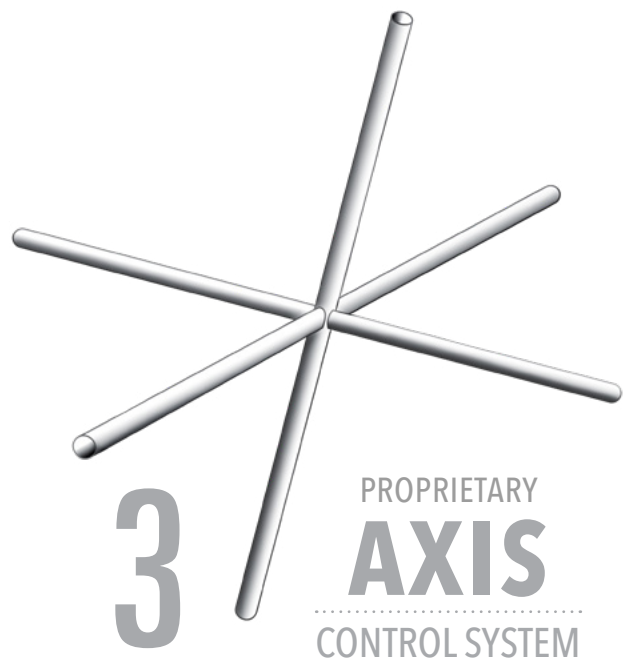
A measure of growth in total dollars managed by Gradient Investments.

**TOP 3%** GRADIENT INVESTMENTS RANKS  
49<sup>TH</sup> OUT OF 1,949 RIA FIRMS\*

As you can see from the third-party statistics below, independent advisors and their clients are continuing to partner with Gradient Investments. Complex financial markets are challenging. Gradient Investments can help you navigate through various economic cycles.

You have choices when it comes to investing your hard-earned money. Gradient Investments is proud to be an investment management firm that is not only progressive and growth oriented, but a firm that offers long-term sustainability.

Gradient Investments actively manages portfolios through its proprietary Wright Investment Strategy, which is based on the principles of flight. Although the Wright brothers' first flight was over 100 years ago, it remains one of the most complex and demanding challenges ever mastered. The Wright brothers conquered this challenge by developing a scientific **3-Axis Control System** that is still used today on fixed-wing aircraft.



\*The facts and data herein is calculated and reported by a third party, Orion Advisory Services, LLC, as of August 31, 2020. The data does not represent all RIA firms rather a subset of RIAs/money managers who use the services of Orion. Orion and Gradient Investments are not affiliated entities. This data should not be used as the sole basis for making any investment decision. This information is not an indication of future results or performance and is not an endorsement of Gradient Investments, LLC by Orion or Financial Advisor Magazine. Please consult your investment advisor and for information on Gradient Investments, please request a copy of our ADV Part 2A.

Like the Wright brothers, we are pioneers. Gradient Investments addresses your investment challenges through a parallel **3-Axis Control System** that actively manages **risk exposure, investment strategy and investment performance**. Founded on the principle of fiduciary responsibility, Gradient Investments provides tailored investment solutions based on your unique objectives.

### 1<sup>ST</sup> AXIS: RISK EXPOSURE

The first axis in the control system actively manages risk exposure. Risk comes in many forms and it is essential that your portfolio is built and actively managed around numerous risk factors.

**Economic:** Chance the global business cycle can affect your investments

**Market:** Likelihood that a broad investment market will decline in value

**Valuation:** Possibility that an investment is overvalued

**Liquidity:** Possibility you will not be able to sell or convert an asset into cash

**Principal:** Chance that your original investment will decline in value or be lost entirely

**Inflation:** Likelihood the money you have invested will decline in real value due to inflation

**Interest Rate:** Variability in an investment's return from a change in interest rates

**Country:** Chance of loss due to stability and viability of a country's economy

**Exchange Rate:** Variability in investment returns caused by currency fluctuations

### 2<sup>ND</sup> AXIS: INVESTMENT STRATEGY

The second axis in the control system actively manages investment strategy. The proprietary strategies at Gradient Investments are built around your investment objectives and risk parameters.

- **Asset Allocation**

- Fixed Income Series
- ETF Endowment Series

- **Tactical**

- Gradient Tactical Rotation (GTR)

- **Strategic**

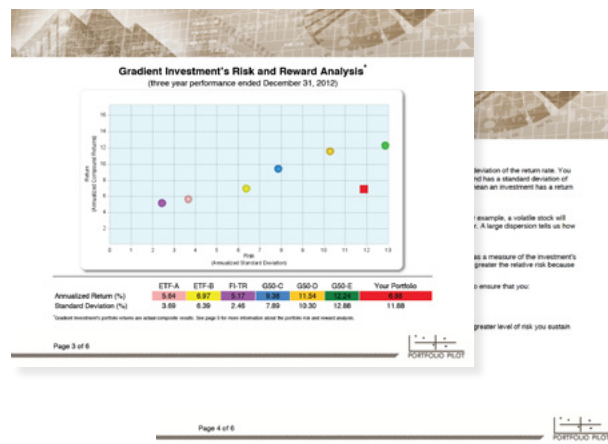
- Gradient 50 US Dividend Portfolio (G50)
- Gradient 40 International Dividend Portfolio (G40i)
- Gradient 33 Growth Portfolio (G33)
- Gradient Core Select Portfolio
- Absolute Yield Portfolio
- Precious Metals Portfolio

### 3<sup>RD</sup> AXIS: INVESTMENT PERFORMANCE

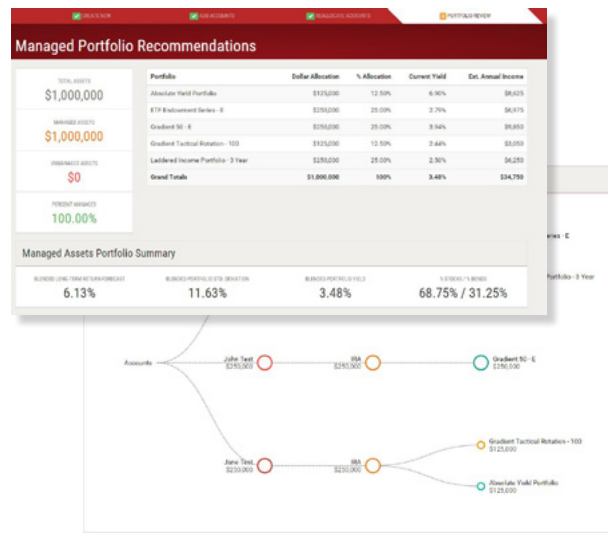
The third axis in the control system actively manages investment performance. Gradient Investments measures portfolio-level investment performance along with total investment performance using proprietary reporting tools.

- **Portfolio Pilot**
- **Navigator System**
- **Interactive Asset Map**

#### Portfolio Pilot



#### Interactive Asset Map



The information herein is for informational purposes only, and data should not be used as the sole basis for making any investment decision. Please consult your advisor before making any investment decisions. For more information on Gradient Investments, request a copy of our ADV Part 2A.

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