## Retirement Income



Report Date: June 2024

Growth of 1,000

#### Risk/Return 8% 6% 4% 2% 0.0 0.1 0.3 0.4 0.5 0.6 0.8 0.9 1.0 **Sharpe Ratio** Retirement Income AGG (IShares Core US Aggregate Bond ETF) MLHY (Bank of America Merrill Lynch U.S. High Yield Index) Monthly Returns Live Performance Data

#### **Index Description**

The Retirement Income strategy, as the name suggests, is devoted to earning high income for investors with tax-deferred accounts, year over year regardless of general stock or bond market conditions. Preservation of capital is a priority while earning an average annual return that is competitive with the corporate bond market, net of all fees. The Retirement Income strategy primarily invests in high yield corporate bond mutual funds but can also invest in municipal bond funds, treasury bonds or funds that hedge against rising interest rates. All positions are fully liquid and held in accordance with our proprietary intermediate term tactical trading parameters.

For more information on and Profitscore's other indicies, please visit www.ProfitScoreIndex.com

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### Contact

John McClure, President & CIO

phone :: 208-489-5286

email :: john.mcclure@profitscore.com

# Retirement Income



Reward Statistics (Annual)	Retirement Income	AGG	MLHY
Compound ROR	-	3.00%	7.06%
Average ROR	-	3.11%	8.03%
Max Gain	-	8.46%	57.48%
Consecutive Wins	-	10	6
% Winning Years	0.00%	86.96%	79.17%
Average Gain	-	4.23%	12.41%
Gain Deviation	0.00%	3.13%	5.53%

Risk Statistics (Monthly)	Retirement Income	AGG	MLHY
Standard Deviation	0.00%	1.29%	2.58%
Worst Loss	0.00%	-4.14%	-16.30%
Consecutive Losses	-	6	4
% Losing Months	0.00%	41.98%	29.68%
Average Loss	-	-0.85%	-2.03%
Loss Deviation	0.00%	0.87%	2.57%

Risk/Reward Statistics (Annual)	Retirement Income	AGG	MLHY
Sharpe Ratio (1%)	0.00	0.69	0.93
Sortino Ratio (1%)	0.00	0.46	0.70

### Past 36 Months

There is not enough data available.

# Investment Allocation



