



# CAPITAL ADVISORS

## Income Bond

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|---------------------|----------------------|------------------------|--------------|
| <b>Objective:</b>   | Capital Preservation | <b>Process:</b>        | Fundamental  |
| <b>Asset Class:</b> | Fixed Income         | <b>Implementation:</b> | ETFs         |
| <b>Holdings:</b>    | 3-5                  | <b>Style Box:</b>      | IG/HY Credit |
| <b>Inception:</b>   | December 2011        | <b>Structure:</b>      | SMA          |

### **Description:**

Capital Advisors' Income Bond Strategy utilizes fixed income-focused exchange-traded funds ("ETFs") to maximize monthly cash flows for investors. The strategy can invest across government securities, corporate credit, agency securities, emerging market debt, and high yield bonds, with a focus on maximizing income for investors.

### **Process:**

We combine credit research with yield curve optimization to maximize income from the credit markets within the boundaries of a priority to preserve capital. We are constantly evaluating both the interest rate and credit environment, and can alter the weightings to the various fixed income asset classes dependent upon our view.

### **Role in Portfolio:**

The Income Bond Strategy extends out on the yield curve and includes a broader range of credit quality to generate a higher level of income.

## DISCLOSURES

### Introduction

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