



CAPITAL ADVISORS

Aggregate Bond

Objective:	Capital Preservation	Process:	Fundamental
Asset Class:	Fixed Income	Implementation:	ETFs
Holdings:	3-5	Style Box:	Inv. Grade Credit
Inception:	December 2011	Structure:	SMA

Description:

Capital Advisors' Aggregate Bond Strategy seeks to strike a balance between liquidity and income objectives. The strategy aims to maximize monthly cash flows for investors, while maintaining liquidity and ready access to capital. The portfolio emphasizes investment-grade securities in the short-to-intermediate maturity range and is executed with fixed income-focused exchange-traded funds ("ETFs").

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 Aggregate approach incorporates elements of liquidity and income and is designed for a "core" exposure to the fixed income asset class.

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Introduction

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