



## PRESS RELEASE

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### QUANTIFIED STF FUND TOP PERFORMER IN CATEGORY AGAIN

#### The Quantified STF Fund Tops Morningstar Category for Third Time in Seven Years

**Bloomfield Hills, MI, January 23, 2024** – [Flexible Plan Investments, Ltd.](#) (FPI), a leading provider of dynamic, risk-managed investment solutions with over \$1.5 billion in assets under management (12/31/23), announced that its Quantified STF Fund (QSTFX) outpaced the other 240 funds in the Morningstar Tactical Allocation category in 2023 returning 61.85%. The fund also outpaced its benchmark; the NASDAQ 100® Index that returned 55.13% for the same period. It is the third time the fund has led its category in the past seven years. It should also be noted that the fund was in the bottom decile of performance for its category during the calendar years 2016, 2018, and 2022. The table below shows a more comprehensive look at the fund’s overall performance as of December 31, 2023:

	Quarter	1 year	5 Year (Annualized)	Since Inception 11/13/15 (Annualized)
QSTFX	22.68%	61.85%	18.25%	14.74%
NASDAQ 100® Index	14.60%	55.13%	22.66%	18.76%

Total annual fund operating expenses for QSTFX: 1.66%

“The performance in 2023 of the STF fund is a result of our team’s ability to identify and capitalize on trends. STF can be positioned up to two-times long versus the NASDAQ 100® Index and up to one-times short depending upon market direction and conditions. While sometimes volatile, the ability to go long and short is part of our dynamic, risk management approach,” said Jerry Wagner, founder and president of FPI and one of the portfolio managers for the 13 Quantified Funds. Mr. Wagner further added “Flexible Plan uses the fund extensively in its most popular dynamic, risk managed SMA strategy: QFC Self -Adjusting Trend Following. Although the fund is aggressive and has even found itself ranked for some years at or near the bottom of its category, using the strategy version reduces its volatility. Another popular Flexible Plan strategy, QFC Equity Trends, further reduces the volatility to allow its use with Growth Investors. Finally, Investors with a wide range of suitability profiles can make use of the fund in FPI’s Multi-Strategy Portfolios – available for Conservative, Moderate, Balanced, Growth and Aggressive suitability profiles.”

Flexible Plan is a subadvisor to [Advisors Preferred](#), a boutique asset manager that manages mutual funds. Advisors Preferred, through its affiliated distributor, Ceros Financial Services, Inc., distributes these funds to financial advisors and financial professionals.

“We’re thrilled that the STF fund is again at the top of its category. We believe this accomplishment speaks to the unique, dynamic approach that Flexible Plan employs and shows that strategies like this have a place in professionally-managed portfolios,” said Catherine Ayers-Rigsby, president of Advisors Preferred.

For more information about the Quantified Funds, visit [www.quantifiedfunds.com](http://www.quantifiedfunds.com), [www.flexibleplan.com](http://www.flexibleplan.com), or [www.advisorspreferred.com](http://www.advisorspreferred.com).

### **About Flexible Plan Investments, Ltd.**

Established in 1981, Flexible Plan Investments, Ltd., invests over \$1.5 billion in assets for clients in its separately managed account business (as of June 30, 2023). As a founding member of the National Association of Active Investment Managers (NAAIM), Flexible Plan, a turnkey asset management program provider, is one of the trade association’s largest and oldest active money managers. The company’s mission is to provide investors with competitive returns, while reducing risk through the use of dynamic risk management, strategic diversification, and cutting-edge technology and support services. For more information, visit [www.flexibleplan.com](http://www.flexibleplan.com)

### **About Advisors Preferred LLC**

Advisors Preferred ([www.advisorspreferred.com](http://www.advisorspreferred.com)) empowers investment advisory firms to launch mutual funds. Acting as the advisor in a sub-advised structure, the firm collaborates with investment management firms to build their practices with actively managed mutual funds, by providing a turn-key solution as well as product consultation, market intelligence, product placement, sales reporting, compliance services, and advanced trading.

Ceros Financial Services, Inc., member FINRA/SIPC, serves as distributor to the funds and is a commonly held affiliate of Advisors Preferred. Advisors Preferred and Ceros are not affiliated with the funds’ sub-advisers.

Past performance does not guarantee future results.

Investing in mutual funds involves risk, including loss of principal. Risks specific to the Quantified and Gold Bullion Strategy Funds are detailed here: [www.quantifiedfunds.com/fund-documents](http://www.quantifiedfunds.com/fund-documents) and [www.goldbullionstrategyfund.com/index.php/investor-materials](http://www.goldbullionstrategyfund.com/index.php/investor-materials). The Funds’ prospectuses have additional details regarding the risks and should be read carefully.

There is no guarantee any investment strategy will generate a profit or prevent a loss. There is no guarantee the funds will achieve their investment objectives.

**An investor should carefully consider the investment objectives, risks, charges and expenses of the Funds before investing. This and other information can be found in the funds’ prospectus and summary prospectus, which can be obtained by calling 1-855-650-7453. The prospectus should be read carefully prior to investing.**

The Morningstar Rating™ for funds, or “star rating”, is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed- end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product’s monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The Morningstar

Rating does not include any adjustment for sales loads. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its three-, five-, and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% three-year rating for 36-59 months of total returns, 60% five-year rating/40% three-year rating for 60-119 months of total returns, and 50% 10-year rating/30% five-year rating/20% three-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent three-year period actually has the greatest impact because it is included in all three rating periods.

The Quantified STF Fund was rated against the following numbers of Tactical Allocation funds over the following time periods: 234 funds in the last three years, and 214 funds in the last five years. With respect to these Tactical Allocation funds, the Quantified STF Fund received a 4-star rating overall, a 3-star rating for 3 years, and a 5-star rating for 5 years. Past performance is no guarantee of future results. No compensation given for ratings.

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