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PIMS, Inc.
Proprietary

23 Standard Portfolios

Start Date: 21 of the 23 Standard Portfolios were created in 2006 using the algorithms and databases within PC&M. The date of the first notebook was June 2006. Portfolios #22 & #23 were added in 2011.

Theory: The 23 portfolios includes income, balanced, growth and value both domestic and worldwide portfolios. At the end of each calendar year quarter all 22 portfolios are updated by calculating performance for the quarter just ending and a new portfolio is created for the next quarter. Total return performance for all 23 portfolios are compared to the S&P 500 Index (with dividends reinvested).

Investment Features:

- * **Trading limited to 4 times each year at the end of each calendar year quarter,**
- * **23 Different investment styles,**
- * **Step-by-step portfolio creation & maintenance procedures,**
- * **7 Databases including 3000 common stocks, ETFs, ADRs, open & closed-end mutual funds, U.S. Treasury notes & bonds, corporate & municipal bonds, 31 developed countries macro-economic data (for GLOBAA Model),**
- * **Total return performance is calculated for each portfolio at the end of each quarter and a new portfolio is created for the next quarter (each portfolio has a unique step-by-step procedure).**

23 Portfolio Performance Compared to the S&P 500 Index:

Period: Last 3 Months ending 12/31/11

4 of the 23 Portfolios bettered the S&P 500 Index

Period: Last 1 Year ending 12/31/11

8 of the 23 Portfolios bettered the S&P 500 Index

Period: Last 3 Years ending 12/31/11

14 of the 23 Portfolios bettered the S&P 500 Index

Subscription Rate for 23 Standard Portfolio Notebook:

Single Copy Rate: Negotiable

Multiple Copy Rate: Negotiable

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