



TurnerCapital Investments™

Beyond Volatility

How Turner Capital
Investments Delivered a
50%+ Return for Advisors

The Challenge

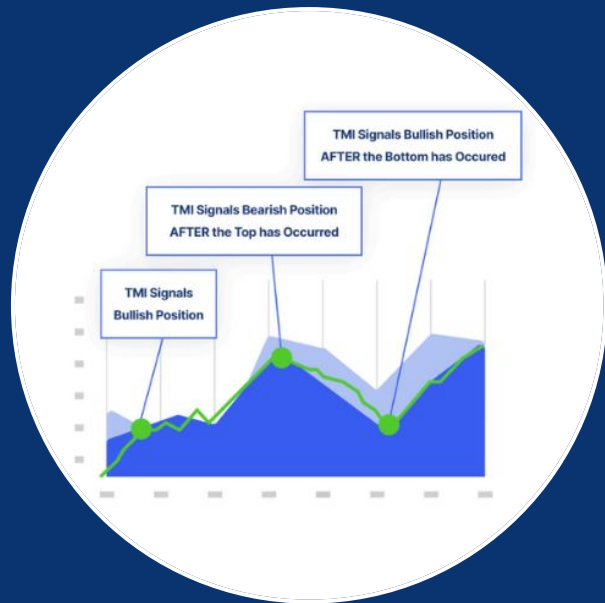
In today's dynamic investment landscape, professional financial advisors face a critical dilemma: how to keep clients confidently invested in the stock market to reap its rewards, while simultaneously shielding them from the anxieties and losses that accompany inevitable market downturns.

Traditional buy-and-hold strategies may leave clients exposed during corrections, which could lead to eroded trust and dissatisfaction for advisors.

The Solution

Turner Capital Investments works with advisors to apply a systematic, rules-based approach to managing equity exposure. Instead of forecasting the unpredictable future, **our process aims to maximize winning trades, minimize losses, and convert unrealized gains into realized profits** before market worries can set in.

The rules-based methodology we implement is battle-tested across many market conditions: bull markets, bear markets, and sudden reversals.



We use a rules-based methodology with **predefined entry and exit signals** that advisors can apply consistently.

The Results

Period: April 25–Aug 25, 2025

The figures below reflect strategy results for the four-month period noted. They do not represent long-term or typical performance.

TMI-1x Strategy	TMI-2x Strategy	TMI-3x Strategy
Trading start date: 4/1/23	Trading start date: 4/1/23	Trading start date: 6/5/24
YTD Performance: +3.51%	YTD Performance: +3.69%	YTD Performance: +4.24%
LTD Performance: +29.22%	LTD Performance: +46.97%	LTD Performance: +15.17%
Last 4 Month Return: +16.63%	Last 4 Month Return: +34.05%	Last 4 Month Return: +50.74%

Results for this period were influenced by prevailing market conditions and strategy exposure; future periods may differ, and losses can occur. Past performance does not guarantee future results.

Elevate Your Practice

This case study highlights how our disciplined, rules-based methodology can deliver tangible results. By helping advisors navigate market volatility and achieve impressive returns, **like the +50.74% seen with our TMI-3x strategy**, we strive to empower them to build stronger, more trusting relationships with their clients.

Our goal is to **give advisors the tools to confidently deliver consistent performance** and lasting peace of mind.

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Thank you for reading.
Do you have questions?

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[Let's Talk 1-on-1](#)



Disclosure

Turner Capital Investments, LLC (TCI) is a registered investment adviser. We may only transact business in those states in which it is registered or qualifies for an exemption or exclusion from registration requirements. Please remember that different types of investments involve varying degrees of risk, and there can be no assurance that the future performance of any specific investment or investment strategy (including those undertaken or recommended by TCI), will be profitable or equal any historical performance level(s). Performance results presented are net of fees and represent the client's total return. All investment strategies have the potential to profit or loss. Changes in investment strategies, contributions or withdrawals may materially alter the performance and results of your portfolio. Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for a client's investment portfolio.

The Turner Capital TMI-1x Strategy utilizes its proprietary, actively managed investment methodology oriented toward the pursuit of long-term capital appreciation via publicly traded equities. This Strategy takes long positions in non-leveraged index ETFs of the S&P 500 and Nasdaq 100 in its methodology-detected bullish market cycles and takes long positions in non-leveraged inverse index ETFs of the S&P 500 and Nasdaq 100 in its methodology-detected bearish market cycles. In methodology-detected transition markets, client capital is placed into higher-yielding money markets. The TMI-1x Strategy seeks to maintain a 50/50 mix of the S&P 500 and Nasdaq 100 index ETFs when in the market and 100% in money markets when out of the market.

The Turner Capital TMI-2x Strategy utilizes its proprietary, actively managed investment methodology oriented toward the pursuit of long-term capital appreciation via publicly traded equities. This Strategy takes long positions in 2x-leveraged index ETFs of the S&P 500 and Nasdaq 100 in its methodology-detected bullish market cycles and takes long positions in 2x-leveraged inverse index ETFs of the S&P 500 and Nasdaq 100 in its methodology-detected bearish market cycles. In methodology-detected transition markets, client capital is placed into higher-yielding money markets. The TMI-2x Strategy seeks to maintain a 50/50 mix of the S&P 500 and Nasdaq 100 2x-leveraged index ETFs when in the market and 100% in money markets when out of the market.

The Turner Capital TMI-3x Strategy utilizes its proprietary, actively managed investment methodology oriented toward the pursuit of long-term capital appreciation via publicly traded equities. This Strategy takes long positions in 3x-leveraged index ETFs of the S&P 500 and Nasdaq 100 in its methodology-detected bullish market cycles and takes long positions in 3x-leveraged inverse index ETFs of the S&P 500 and Nasdaq 100 in its methodology-detected bearish market cycles. In methodology-detected transition markets, client capital is placed into higher-yielding money markets. The TMI-3x Strategy seeks to maintain a 50/50 mix of the S&P 500 and Nasdaq 100 3x-leveraged index ETFs when in the market and 100% in money markets when out of the market.

According to SEC compliance guidelines, Turner Capital is NOT allowed to provide its clients with a benchmark comparison to its Strategies unless the benchmark has similar investment objectives to its Strategies. Because TCI's methodology is actively managed, rules-based and tailored to shifting market cycles (bull, bear, and transitional), any performance comparison against a benchmark that doesn't account for these shifts can inadvertently misrepresent an unequal and misleading comparison of outcomes. As such, TCI Strategies do not provide benchmarks for comparison of performance to TCI Strategies.

Important

- PAST PERFORMANCE DOES NOT INDICATE FUTURE RETURNS.
- NO RECOMMENDATION IS MADE REGARDING THE BUYING OR SELLING OF ANY EQUITY MENTIONED IN THIS MATERIAL, NOR ARE WE RECOMMENDING A METHODOLOGY OF TRADING THAT CAN REPLICATE THE DATA DERIVED FROM ACTUAL OR SIMULATED HISTORICAL TRADING.
- THE SOURCE OF DATA, INCLUDING THE CHARTS AND TABLES SHOWN IN THIS WEBINAR ARE FROM TURNER CAPITAL INVESTMENTS AND/OR FROM PUBLICLY AVAILABLE DATA.