PortfolioMason
BUILDING BETTER PORTFOLIOS

Information School
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The Problem

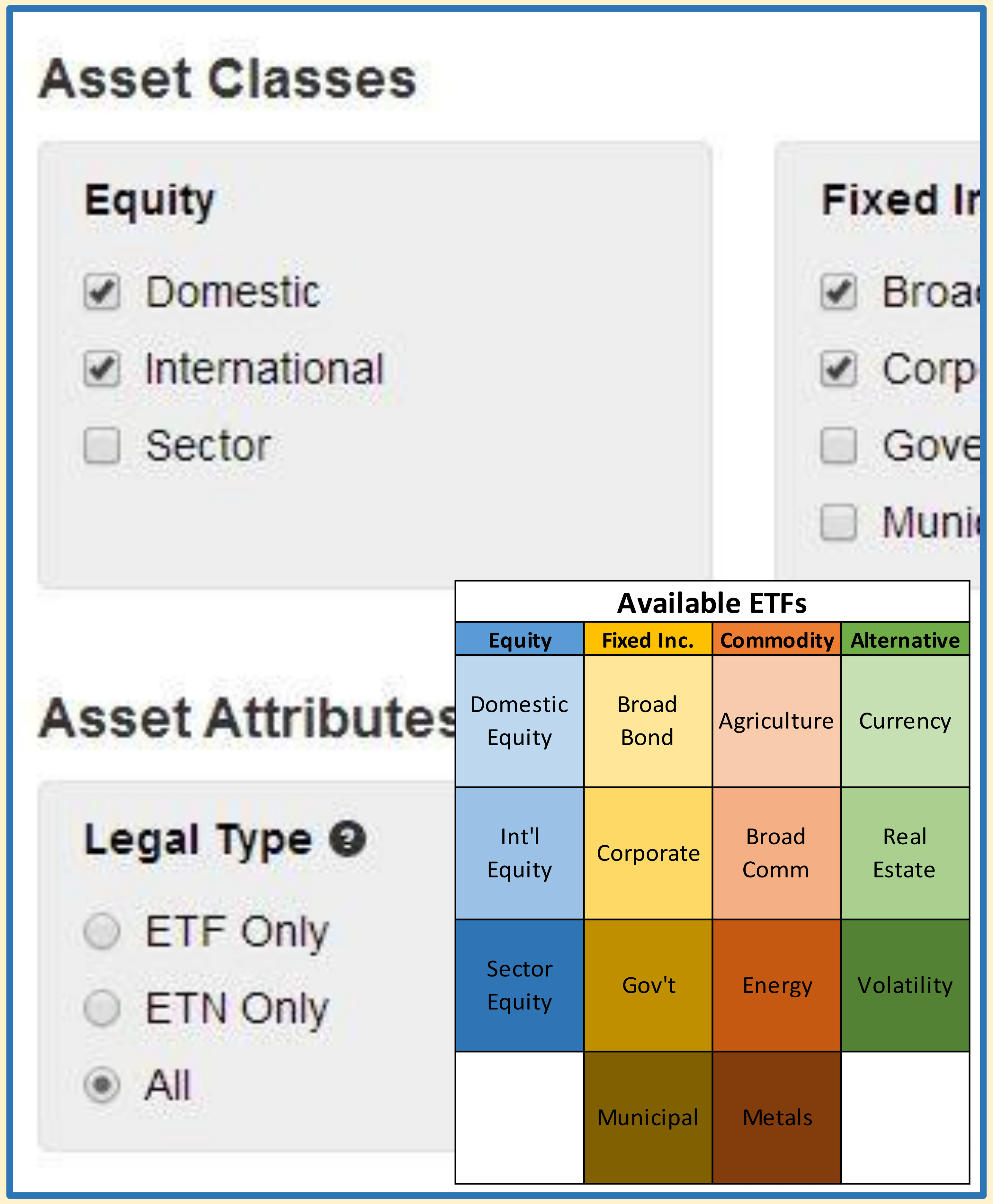
Brokerage firms do not have a web-based, intuitive, and cost-effective tool to buy and sell exchange-traded funds (ETFs). Existing tools are either expensive, difficult to learn for first-time users, or have expensive licensing fees.

The Solution

Strategy Builder is a web application designed to give the investor complete control over their investments by creating a straightforward list of ETFs to invest in based on the investor's preferences and financial goals.

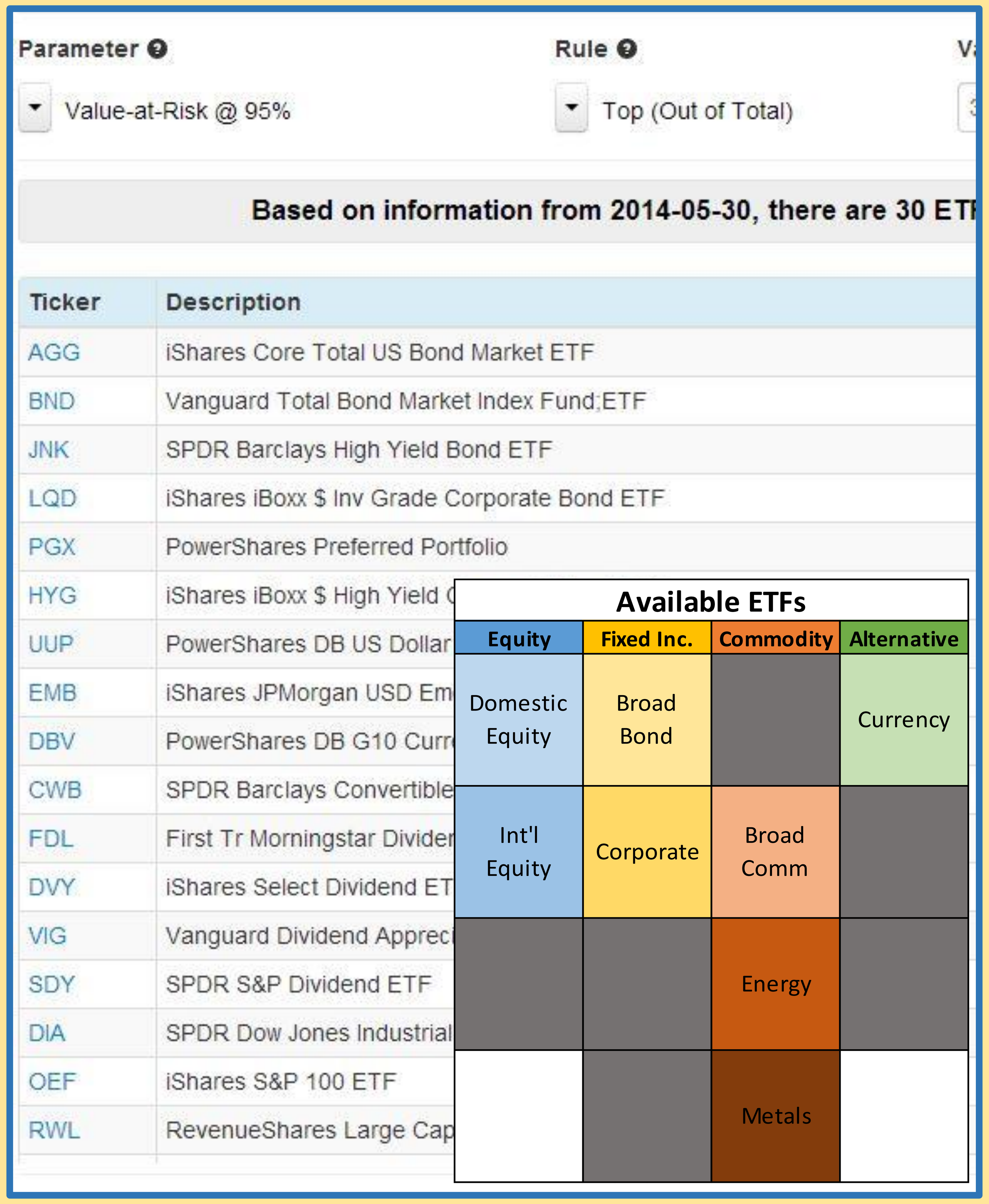
1. Define the Universe

The investor's universe is comprised of **broad categories of ETFs** they want to invest in. Examples of categories include domestic (holdings in the United States) and corporate (holdings in large companies).



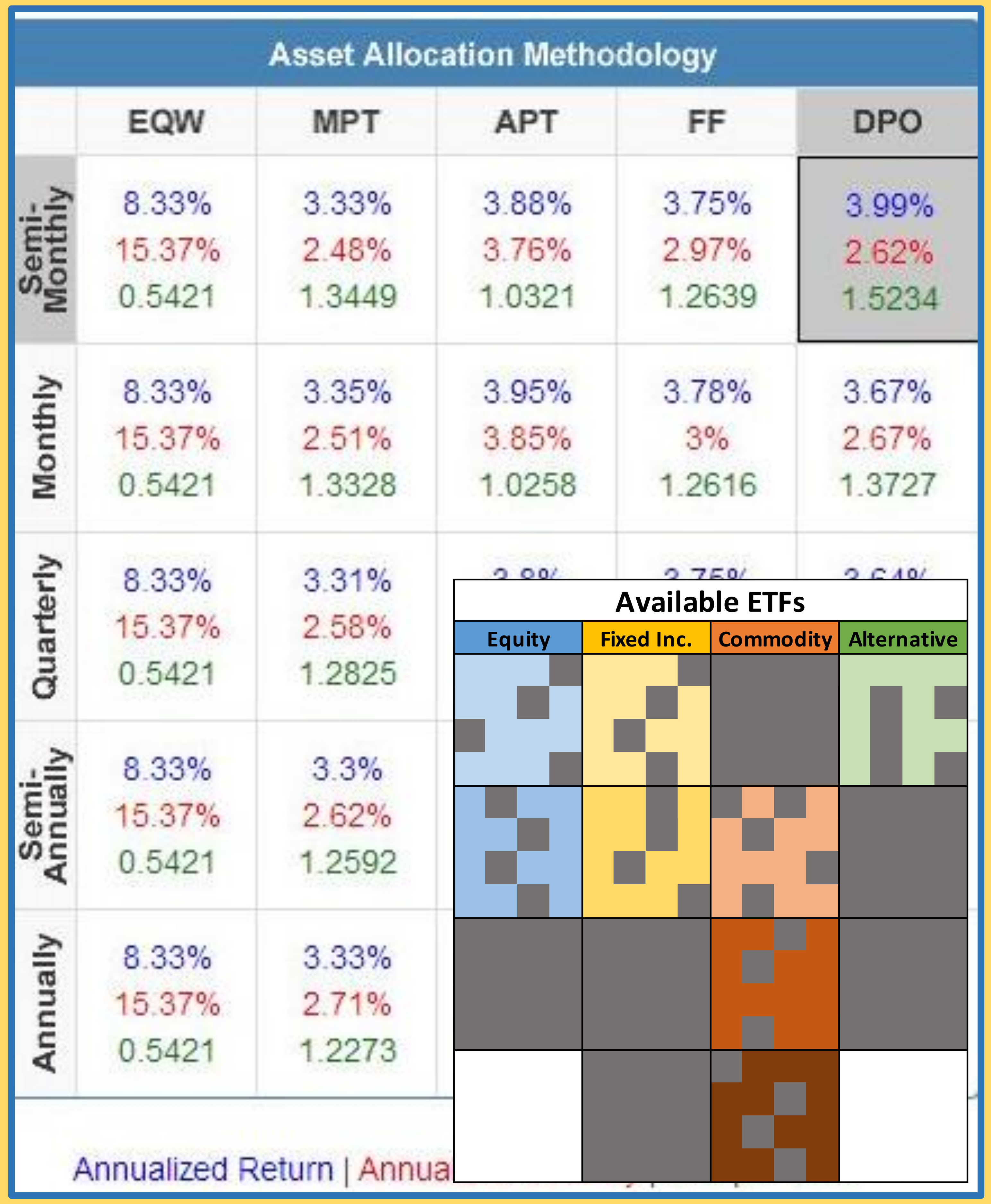
2. Filter by Criteria

Some ETFs perform better than others in the same category. Investors use filters to determine what constitutes a good ETF, leaving only the best results to invest in; for example, by removing ETFs with a Price to Earnings ratio below a certain threshold.



3. Allocate the Results

The investor's allocation, or distribution, methodology is calculated by using three factors: **aggressiveness** (acceptance of risk), **algorithm** (how to find the optimal mix), and **frequency** (how often to evaluate the ETFs for performance).



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