

Asset Rotation: The Demise of Modern Portfolio Theory and the Birth of an Investment Renaissance

By Matthew P. Erickson

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An all-weather, tactical approach to asset management utilizing Exchange Traded Funds (ETFs)

In *Asset Rotation*, portfolio management pioneer Matthew P. Erickson demonstrates a time-tested approach to asset management that has worked throughout the history of capital markets, in good times and bad. Providing investors with strong participation in rising markets, but more importantly with a discipline to reduce participation in prolonged declines. Over time this revolutionary approach has yielded superior returns, with significantly reduced levels of risk; providing the engine for true, long-term sustainable growth.

The investment world as we know it has changed, and the paradigm has shifted. What has worked in the past may no longer work in the future. No longer may bonds be regarded as a safe haven asset class, as for the first time in generations, investors in fixed income face losses as interest rates rise from historical all-time lows. For those adhering to a conventional Modern Portfolio Theory based investment approach to asset management, what was once regarded as safe and stable, may very well soon become our greatest impediment.

Asset Rotation provides investors with a practical solution for today's real world problems. This tactical approach to asset management provides us with concrete proof that there is indeed a better way.

We are standing on the precipice of an *Investment Renaissance*. What was previously impossible, is now possible. Find out how.

- Presents an easy-to-understand price momentum-based approach to investing
- Illustrates the benefits of asset rotation
- Offers a systematic approach for securing a sound financial future
- Provides further insights as to how to customize your own asset rotation portfolio

Matthew Erickson gives investors a hands-on resource for how to navigate an increasingly difficult investment landscape, by providing them with keen insights into the most rapidly growing segment of the investment markets.

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Asset Rotation: The Demise of Modern Portfolio Theory and the Birth of an Investment Renaissance By Matthew P. Erickson Bibliography

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Editorial Review

From the Inside Flap

"*The virtues of Modern Portfolio Theory are taught at every business school across the country. . .The reality is that the investment world as we know it is changing. Even what has worked in the past may not continue to work in the future*."—From the Preface

The paradigm has shifted and we now find ourselves standing on the precipice of an *Investment Renaissance.* Adhering to a conventional "Modern Portfolio Theory"-based approach to asset management was once regarded as a safe and stable risk-adjusted strategy; however, this widely adopted practice may soon become our greatest impediment to achieving long-term success. *Asset Rotation* presents a time-tested approach to investing that leads one to question the virtues of Modern Portfolio Theory. Unlike more traditionally accepted methods, asset rotation has proven to be successful throughout the history of capital markets, in good times and bad. Written by Matthew P. Erickson, CEO and Chief Investment Officer of Renaissance Capital Management, this important resource outlines a timely approach to portfolio management in which limiting losses is paramount—focused on the principles of asset rotation, and not asset allocation.

As Erickson explains, more than a decade ago taking an asset rotation based approach would have been nearly impossible. But with the proliferation of the Exchange Traded Fund (ETF) in recent years, what was previously impossible is now possible for any investor. ETFs give investors the opportunity to tactically navigate the investment landscape, with the ability to dramatically alter the construct of their portfolio with only a handful of trades. This evolutionary investment vehicle enables one to implement tactical shifts in their portfolios in an effort to avoid prolonged declines. *Asset Rotation* offers investors at all levels of expertise a method for executing these strategies in order to maximize long-term returns.

Step by step, *Asset Rotation* details a tactical, price-momentum-based strategy and reveals the keys for how to participate in rising markets, but more importantly, maintain a discipline to reduce participation in prolonged declines. Over time, this revolutionary approach has proven to yield superior returns with significantly reduced levels of risk. Asset rotation, not asset allocation, provides the engine for true, long-term sustainable growth.

From the Back Cover

PRAISE FOR ASSET ROTATION

"If you have time to read only one investment book, this should be the one. It will forever change the way you think about investing."
—Dr. BOB FROEHLICH, bestselling author and Retired Vice Chairman of Deutsche Asset Management

"Matthew Erickson has set a new standard in formulating the optimal portfolio strategy in this post-crisis world. In essence, a guide-post in staying ahead of the curve, maintaining a disciplined 30,000 bird's-eye view, and blocking out the noise that often gets investors into trouble."
—DAVID ROSENBERG, Chief Economist and Strategist, Gluskin Sheff + Associates

"Successful investing often comes down to three things—a sound investment strategy, an unemotional,

disciplined implementation of that strategy, and the ability to ignore short-term noise that forever distracts investors from their true long-term goals. Matt's book provides readers with the tools to accomplish all three."
—JAMES P. O'SHAUGHNESSY, author of *What Works on Wall Street* and Chairman & CEO, O'Shaughnessy Asset Management LLC

"Erickson goes against the trend by going with the trend in *Asset Rotation*. A fresh, timely read for all investors, Erickson lays the groundwork by exploring timeless investing principles such as the importance of controlling losses and the value of low-cost investing. Challenging conventional portfolio theory, Erickson shows how investor psychology and the burgeoning ETF market form the ingredients necessary to produce dynamic trading strategies designed to produce higher returns with lower risk."
—JIM BESAW, Chief Investment Officer, GenTrust Wealth Management

"What distinguishes Matt's book from most others is how he provides the reader the tools, process, and examples necessary to operate an investment portfolio using tactical strategies. Matt has provided the reader with what any reader craves—explanations and answers to untold truths. This is by far one of the best investment strategy books I have ever read."
—CHRISTOPHER NEUDECKER, JD, MBA, EdD in-progress, Chief Investment Officer and Investment Portfolio Manager

"Great read! Matthew manages to convey a complicated message into a simple to understand investment theory. From understanding the need and the process to carrying the reader through implementation and execution, this book delivers the necessary tools to establish the investment discipline necessary to be a successful investor."
—ROBERT ROMAN, President, Managing Partner, Legacy Private Client Group

About the Author

MATTHEW P. ERICKSON is the CEO and Chief Investment Officer for Renaissance Capital Management, LLC, a boutique investment management firm located in Metropolitan Detroit, Michigan. Concurrently, Matt also serves as the CIO for Legacy Planning & Associates, Inc., an affiliated financial planning firm based out of Grand Rapids, MI. Among Matt's primary functions is the day-to-day oversight and portfolio management of the firms' proprietary investment portfolios.

Each of the Renaissance Portfolios are managed in accordance to Matt's proprietary systematic and tactical methods of asset management, blending together three stylistically different approaches to investment management, including tactical managed ETF portfolios, opportunistic individual stock portfolios, and traditional Modern Portfolio Theory based allocations with a "beta-rotation" overlay. By combining these three unique approaches into one overarching portfolio, investors are provided with a higher degree of diversification. Prior to starting his own asset management firm, Matt was a partner in a successful wealth management advisory practice at UBS Financial Services, overseeing more than $350 million in private client assets. Matt and his wife Jill currently reside in Canton, Michigan with their daughter Mackenzie and son Jacob.

Users Review

From reader reviews:

Richard Morris:

Do you considered one of people who can't read pleasant if the sentence chained inside straightway, hold on guys this kind of aren't like that. This Asset Rotation: The Demise of Modern Portfolio Theory and the Birth of an Investment Renaissance book is readable by means of you who hate the straight word style. You will find the facts here are arrange for enjoyable looking at experience without leaving even decrease the knowledge that want to provide to you. The writer associated with Asset Rotation: The Demise of Modern Portfolio Theory and the Birth of an Investment Renaissance content conveys thinking easily to understand by a lot of people. The printed and e-book are not different in the articles but it just different available as it. So , do you nonetheless thinking Asset Rotation: The Demise of Modern Portfolio Theory and the Birth of an Investment Renaissance is not loveable to be your top checklist reading book?

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