Singer Wealth Advisors' "Spartan" Tactically Managed Account, up 62% in First Nine Months Since Inception

Singer Wealth Advisors, Inc.

BOCA RATON , FL, USA, June 9, 2020 /EINPresswire.com/ -- Since September 1, 2019, Singer Wealth Advisors, an SEC Registered Investment Advisory firm has been offering its clients a rather unique investment strategy. Instead of the customary buy and hold approach that rides the ups and downs of the market, this approach utilizes technical analysis to make low duration high probability trades. The separately managed "Spartan" account, which is custodied at Charles Schwab and can invest both long and short positions, has returned 62.5% after fees since September, compared to the S&P 500 gain of about only 5%. March was a particularly compelling month for the account which gained over 9% compared to a loss of over 12% for the S&P 500. The returns have been so impressive that Singer Wealth Advisors, recently hired Cascade Investment Compliance &Verification Services LLC to review and verify the actual returns. Christi Coffman, Singer's VP of Portfolio Management who led the performance review, stated "The performance review process involved providing Cascade with valuation data for all of the accounts in the strategy, as well as sample trade data from an independent source, reported by Charles Schwab. Cascade tested that all of the accounts managed to the Spartan strategy were included in the composite performance return calculations, and they tested that we applied a consistent account and composite return calculation methodology before issuing a review opinion on the composite returns of SWA's Spartan tactically managed strategy."

The strategy relies on several technical indicators including Gann charts, RSI indexes and public investor sentiment which is a contrary indicator. According to Keith Singer, the firm's founder, "when most retail investors are very bullish or very bearish, the crowd is usually wrong. Therefore, investor sentiment is a very useful contrary indicator." Additionally, the strategy relies on a proprietary algorithm called the GAMA money flow algorithm which measures institutional

trading volume as a percentage of overall volume. A surge in institutional volume is a bullish indicator and a contraction is bearish. As with any investment, this strategy has investment risk. However, all trades use stop-loss orders to minimize the impact of a losing trade. Moreover, the strategy remains in cash unless a high probability trade is identified. Fortunately, there have not been too many losing trades thus far. Out of 46 trades that have been completed, 38 have been profitable. As word has spread, assets under management in this separately managed account has more than tripled during the first two months of the second quarter. According to Singer, "What's nice about this account is that, unlike a typical hedge fund that offers long and short exposure, each client's investment is held in their own name at Charles Schwab and the accounts do not require a minimum holding period as the clients' investment accounts are redeemable each day."

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