

Kingsview Investment Management Launches Opportunity Income Strategy

Opportunity Income Aims To Help Investors Meet Overall Fixed Income Goals



KINGSVIEW
INVESTMENT MANAGEMENT

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/EINPresswire.com/ -- [Kingsview](#)

[Investment Management](#) ("KIM") today announced the launch of their [Opportunity Income](#) (OI) strategy, which was designed with the goal of optimizing allocations across various fixed income sectors. Opportunity Income's primary objective is to deliver a better risk-adjusted return than the aggregate bond benchmark by analyzing spreads between short and long-term U.S. treasury bonds.



We respect the importance of keeping a longer-term outlook while still protecting against the risks of tomorrow."

Mitch Ehmka, Director of Trading and Co-Portfolio Manager

Investors seeking a "permanent" active fixed income allocation to balance the risks of investing in equities may find Opportunity Income of interest. It is a potential solution for investors wondering what to do right now in the fixed income portion of their portfolios, but might be worried about key bond risks such as inflation, rising rates, or even economic uncertainty.

"We're excited to share this strategy with investors

because we understand how challenging fixed income can be to invest in at times like this." – Paul Nolte, Senior Vice President and Co-Portfolio Manager

Opportunity Income's philosophy reflects KIM's belief that a historically informed, fundamental approach to core fixed income investing can provide long-term superior risk-adjusted return. The strategy was designed with these elements in mind:

Passive ETF Selection – Investments consist of Core Fixed Income exposures derived via low-cost ETFs like that of the benchmark at times but can span a variety of classifications, quality, and duration. At times, the portfolio may take key exposures away from the benchmark in an attempt to optimize for the current environment.

Risk Management – Opportunity Income is an overall risk framework, helping to guide fixed

income asset allocation throughout the interest rate & credit cycle by analyzing current treasury spread positioning.

Consistency – Fixed income asset class risks, returns and correlations may vary depending on where you are in this cycle. Historically there are possibly more opportune times to overweight or underweight the different fixed income exposures.

"We respect the importance of keeping a longer-term outlook while still protecting against the risks of tomorrow." – Mitch Ehmka, Director of Trading and Co-Portfolio Manager

Many strategies try to be forward-looking, guessing where interest rates may be headed, or strictly investing in certain asset classes, regardless of the current interest rate or risk environment. Opportunity Income does not try to guess, but instead analyzes where we are in the interest rate cycle and invests in those securities that have historically performed well in those environments. The overall portfolio is adjusted once a month but keeps pace as economic conditions change.

Read more about Kingsview Investment Management's portfolio strategies at <https://kingsviewim.com/strategy-cards/>.

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About Kingsview Partners

Kingsview Partners is a unique alternative in a crowded field of financial advisory offerings. The firm holds a simple belief that quality of service, knowledge of subject matter and fairness can all coalesce into a successful business. Dedication to their clients' welfare serves as a foundational trait, and one deeply entrenched within the cultural fabric of Kingsview. For many, the financial services industry has fallen dramatically short of meeting their needs, but Kingsview aims to do better and is dedicated to "Elevating the Standard of Care."

To achieve this mission, Kingsview Partners operates Kingsview Wealth Management, a fee-based, Registered Investment Advisor serving thousands of individual clients across the nation. Complementing the firm's advisory business is their full-service insurance agency, Kingsview Trust and Insurance Services. Finally, Kingsview Partners works to ensure clients have access to high-value, low-cost, professionally managed investments via Kingsview Investment Management, a standalone asset manager providing investment portfolios to meet nearly any client need.

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Kingsview Investment Management ("KIM") is the internal portfolio management group of KWM. KIM asset management services are offered to KWM clients through KWM IARs. KIM asset management services are also offered to non KWM clients and unaffiliated advisors through model leases, solicitor agreements and model trading agreements. KWM clients utilizing asset management services provided by KIM will incur charges in addition to the KWM advisory fee.

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The Bloomberg U.S. Aggregate Bond Total Return Index is an index designed to provide a measure of the performance of the U.S. investment grade bonds market, which includes investment grade U.S. Government bonds, investment grade corporate bonds, mortgage pass through-securities and asset-backed securities that are publicly offered for sale in the United States. The securities in the index must have at least 1 year remaining to maturity. In addition, the securities must be denominated in U.S. dollars and must be fixed rate, nonconvertible, and taxable.

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