

Kingsview Wealth Management, LLC Launches Four New Monarch Fund ETFs

Monarch ETFs Help Provide Optimal Portfolio Positioning for Investors

CHICAGO, IL, UNITED STATES, March 7, 2024 /EINPresswire.com/ -- Kingsview Wealth Management, LLC ("Kingsview") announced today the launch of four new [Monarch Funds](#) ETF

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Kingsview CIO Scott Martin

strategies designed to provide investors greater accessibility to Kingsview's innovative investment approach. “This offering marks a significant opportunity for us to further empower investors with optimal portfolio positioning across a wide range of asset classes with unique investment approaches,” says Kingsview CIO Scott Martin.

Monarch Funds’ four new ETF strategies are:

- Monarch Dividend Plus Index ETF (Symbol: MDPL)
- Monarch Select Subsector Index ETF (Symbol: MSSS)
- Monarch Volume Factor Dividend Tree Index ETF (Symbol: MVFD)
- Monarch Volume Factor Global Unconstrained Index ETF (Symbol: MVFG)

The Monarch Funds trade on the CBOE BZX Exchange and are passively indexed ETFs that seek to replicate custom indices also recently launched by Kingsview.

MDPL seeks to replicate investment results that generally correspond, before fees and expenses, to the performance of the Kingsview Dividend Plus Index. The Index consists of 30 equally weighted U.S. large and mid-cap stocks from the Russell 1000 Index that represent all economic sectors within the S&P 500 Index and that represent dividend paying value stocks that deliver dividend cash flows across all market cycles. The Index follows a proprietary rules-based methodology that initially screens the companies listed on the Russell 1000 for both absolute and relative dividend growth and free cash flow generation metrics to determine its composition. The 30 highest-scoring companies are selected for the Index. These companies are expected to provide dividend income “plus” strong capital appreciation.

MSSS seeks to replicate investment results that generally correspond, before fees and expenses, to the performance of the Monarch Select Subsector Index. The Index follows a proprietary

rules-based methodology that selects which equity sectors and subsectors to invest in based on the phase of the economic cycle. The methodology uses employment trends to determine the phase of the economic cycle and identifies the sectors and subsectors that have historically performed well during such cycle. The Index methodology selects the ETFs that are expected to deliver the best risk adjusted return for the identified phase.

MVFD seeks to replicate investment results that generally correspond, before fees and expenses, to the performance of the Monarch Volume Factor Dividend Tree Index. The Index follows a proprietary rules-based methodology that screens 3,000 equities from the Russell 3000 of U.S. origin or exposure to identify stocks with potential for positive cash flow and dividend growth. Kingsview then applies its proprietary "Volume Factor" ranking methodology to generate a composite score for each stock based on its capital-weighted volume, price, and the relationship between trading volume and price as measured by the proprietary "Volume Price Confirmation Indicator." The 40 highest-scoring stocks are selected for the Index when capital flow trends are positive. When capital flow trends are negative, the Index reduces its exposure to equities and increases its exposure to fixed income ETFs up to 50% of the Index.

MVFG seeks to replicate investment results that generally correspond, before fees and expenses, to the performance of the Monarch Volume Factor Global Unconstrained Index. The Index consists of up to 25 equally-weighted equity ETFs that demonstrate positive cash flow. When the cash flow trends are negative, a portion or all of the Index consists of one or more treasury ETFs. A proprietary "Volume Factor" ranking methodology seeks to identify the areas of the market with positive cash flow. When cash flow trends are positive, the Index consists of ETFs that provide exposure to the areas and sectors of the market that are drawing the strongest cash flows. When cash flow trends are negative, as measured by trends in large-capitalization stocks and how many stocks are participating in a market decline, the Index consists of treasury ETFs.

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About Kingsview Partners

Kingsview Partners operates Kingsview Wealth Management, a fee-based Registered Investment Advisor that serves thousands of individual clients across the nation through independent advisor offices. The firm's advisory business is complemented by our full-service insurance agency, Kingsview Trust and Insurance. Kingsview Investment Management, our standalone asset manager, provides investment portfolios to meet various client needs.

Kingsview Wealth Managers have a suite of options that include third-party money managers, insurance carriers, platform providers and custodians. Kingsview Partners maintains custodial relationships with Charles Schwab & Co., Raymond James & Associates and Interactive Brokers.

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Important Risk Information

Investors should carefully consider the investment objectives, risks, charges and expenses of the Monarch Funds. This and other important information about the Funds are contained in the prospectus and summary prospectus, which can be obtained at www.monarchfunds.com or by calling 541-291-4405. The prospectus should be read carefully before investing. The Monarch Funds are distributed by Northern Lights Distributors, LLC, member FINRA/SIPC. Kingsview Wealth Management, LLC is not affiliated with Northern Lights Distributors, LLC.

The Funds are new with limited operating history. Past performance does not guarantee future results. The Funds' net asset value and investment return will fluctuate based upon changes in the value of its portfolio securities. There is no assurance that the Funds will achieve their investment objectives, and an investment in the Funds is not by itself a complete or balanced investment program. For a complete description of the Funds' principal investment risks, please refer to the prospectus and summary prospectus.

The Funds seek positive absolute returns. Fund holdings may fluctuate in value in response to individual companies' activities and general market and economic conditions. While the shares of ETFs are tradable on secondary markets, they may not readily trade in all market conditions and may trade at significant discounts in periods of market stress. ETFs trade like stocks, are subject to investment risk, fluctuate in market value, and may trade at prices above or below the ETF's net asset value. Brokerage commissions and ETF expenses will reduce returns.

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Renee Goyeneche
Kingsview Partners
+1 541-237-7648
[email us here](#)

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