



**MEEDER**  
INVESTMENT MANAGEMENT

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Time tested. Model driven.



# Firm Overview

 <p>OVER <b>45</b> YEARS OF EXPERIENCE</p>	 <p>HEADQUARTERED IN <b>COLUMBUS, OH</b></p>	 <p>MUTUAL FUNDS, INVESTMENT PORTFOLIOS, SEPARATE ACCOUNTS, AND RETIREMENT PLAN SOLUTIONS</p>
 <p>OVER <b>\$25</b> BILLION IN ASSETS UNDER MANAGEMENT, ADVISEMENT, AND ADMINISTRATION AS OF 6/30/19</p>	 <p>DEFENSIVE EQUITY STRATEGY (1974) MUIRFIELD FUND (1988) TACTICAL FIXED INCOME (1988) ASSET ALLOCATION PORTFOLIOS (1995)</p>	<p><b>SEASONED INVESTMENT TEAM</b> CFA® CHARTERHOLDERS CMTS CAIA PORTFOLIO MANAGERS &amp; ANALYSTS</p> 

## Why Meeder Investment Management?

Years of navigating various market cycles have influenced our holistic approach to managing money. Our investment philosophy encourages a multidimensional view, as we believe there are multiple forces that influence the market, and many ways to achieve investment objectives. This wide view of the markets, and our quantitative process, allows us to customize solutions and services for a variety of clients.

We are dedicated to helping financial advisors and their clients achieve success. Using a model-driven, multi-discipline/multi-factor approach to investing, our objective is to improve outcomes for investors with varying goals.

### PIONEERS OF TACTICAL INVESTING SINCE 1974

 <p><b>BOTTOM UP</b> Valuations Fundamentals Sentiment</p>	 <p><b>TOP DOWN</b> Economic Monetary Fiscal Policy</p>	 <p><b>TECHNICALS</b> Trends Momentum Breadth</p>
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MEEDER IPS UTILIZES A MULTI-DISCIPLINE/MULTI-FACTOR APPROACH.

# Model Portfolios

## MEEDER FUNDS AND MEEDER INVESTMENT PORTFOLIOS

We offer a full spectrum of mutual funds, including asset allocation, global/international, equity, and fixed income funds. Our asset allocation portfolios are constructed using proprietary mutual funds and combine our Equity, Defensive Equity and Fixed Income strategies, which are designed to complement one another in an effort to achieve client objectives.

### GROWTH STRATEGY

The Growth Strategy is a constrained tactical strategy that can shift exposure primarily among equity securities including sector over and underweights, international securities, and market capitalization ranges.

### DEFENSIVE EQUITY STRATEGY

The Defensive Equity Strategy is an unconstrained tactical strategy that can shift from equity securities to cash or fixed income securities when the risk/reward relationship of the stock market is deemed unfavorable.

### FIXED INCOME STRATEGY

The Fixed Income Strategy is a strategy that can shift between U.S. government and agency securities, investment-grade bonds, high-yield corporate bonds, and international debt. It also incorporates duration management to maneuver between short or long duration positions.

## HIGHER RISK/ RETURN POTENTIAL



**GROWTH PORTFOLIO**  
100% Growth Strategy



**MODERATE GROWTH PORTFOLIO**  
100% Defensive Equity Strategy



**BALANCED PORTFOLIO**  
70% Defensive Equity Strategy  
30% Fixed Income Strategy



**MODERATE CONSERVATIVE PORTFOLIO**  
50% Defensive Equity Strategy  
50% Fixed Income Strategy



**CONSERVATIVE PORTFOLIO**  
30% Defensive Equity Strategy  
70% Fixed Income Strategy

## LOWER RISK/ RETURN POTENTIAL

### ASSET ALLOCATION FUNDS

- Meeder Dynamic Allocation Fund
- Meeder Muirfield Fund
- Meeder Balanced Fund
- Meeder Moderate Allocation Fund
- Meeder Conservative Allocation Fund

### EQUITY/SPECIALTY FUNDS

- Meeder Quantex Fund
- Meeder Spectrum Fund

### GLOBAL/INTERNATIONAL FUND

- Meeder Global Allocation Fund

### FIXED INCOME FUND

- Meeder Total Return Bond Fund



6125 Memorial Drive, Dublin, Ohio 43017 | 1.866.633.3371 | [meederinvestment.com](http://meederinvestment.com)

Risk Information: All investments carry a certain amount of risk, including the risk that an investor can lose the value of their investment. There is no guarantee that the Portfolios will achieve their investment objectives.

Investors are advised to consider the investment objectives, risks, charges, and expenses of the Meeder Funds and portfolios carefully before investing. The Meeder Funds prospectus contains this and other information about the funds. To request or receive a copy of the Meeder Funds prospectus, or information about Meeder Portfolios, contact Client Services at (866) 633-3371 or visit [www.meederfunds.com](http://www.meederfunds.com).

The portfolios are not mutual funds or other commingled investment vehicles registered with the Securities and Exchange Commission. The Meeder Investment Portfolios are able to invest in a broad range of equity and fixed income securities, including but not limited to the Meeder Funds, non-proprietary mutual funds, futures contracts, and exchange-traded funds.

Advisory services provided by Meeder Advisory Services, Inc. and/or Meeder Asset Management, Inc.  
Meeder Funds distributed by Advisor Dealer Services, Inc., member FINRA.