

Quick Take



Following strong labor market data on Friday, the S&P 500 finished above 6000 for the first time since February 21st. The short-term model is positive with 8 of the 10 trend and momentum indicators being positive.



Market RISK has continuously improved since the VIX and MOVE indexes reached highs on April 8th. Both expected equity and bond market volatility are below average.



The long-term model is negative as elevated valuations are potential headwinds for equity markets, particularly within a relatively higher interest rate environment.

OVERALL MODEL OUTPUT

LONG-TERM



INTERMEDIATE-TERM



SHORT-TERM



MARKET RISK

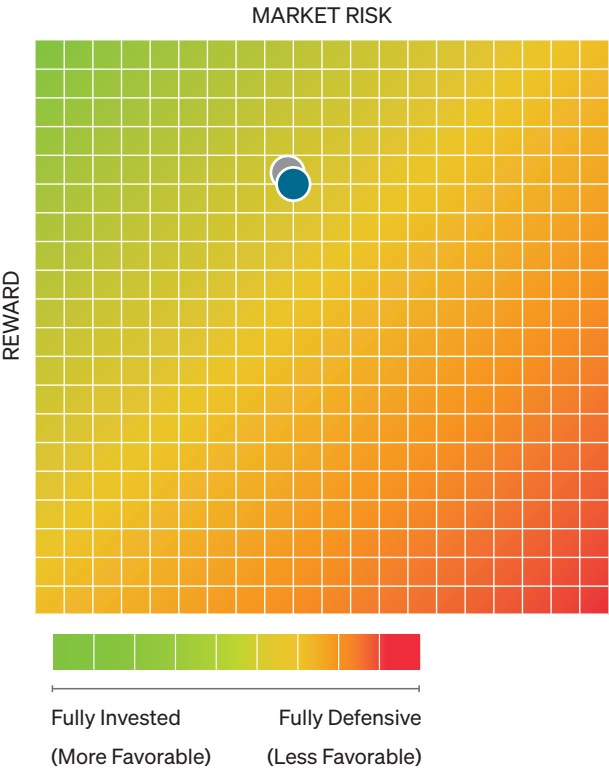


MEEDER

A Closer Look at Our Tactical Positioning Targets

Some Meeder Portfolio strategies utilize our Defensive Equity Strategy to determine what portion of the portfolio’s equity sleeve will be invested in the equity markets. The dynamic statistical model analyzes and ranks over 70 different factors from our short, intermediate, and long term models to estimate the potential reward and marketplace risk of the equity markets. When the model indicates that the risks of the stock market may be greater than its potential rewards, the portfolios can scale back their equity exposure.

DEFENSIVE EQUITY SNAPSHOT



DEFENSIVE EQUITY ALLOCATION



UNDERSTANDING THE DEFENSIVE EQUITY SNAPSHOT

The vertical axis of the grid combines the scores of our short, intermediate and long-term models to arrive at the reward value for the stock market. The horizontal axis represents the model’s internal measure of stock market risk. The reward value is divided by marketplace risk to arrive at our recommended percentage of Net Equity Exposure. The allocation of each portfolio’s equity sleeve will vary depending on the strategy of the portfolio.

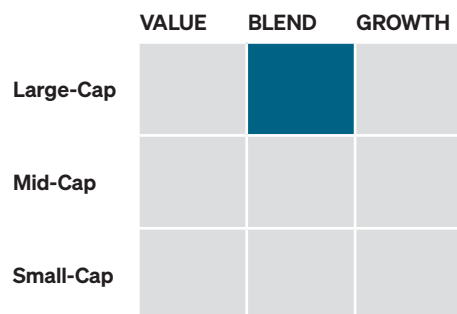
As of June 6, 2025 As of May 8, 2025

Meeder Equity Strategy

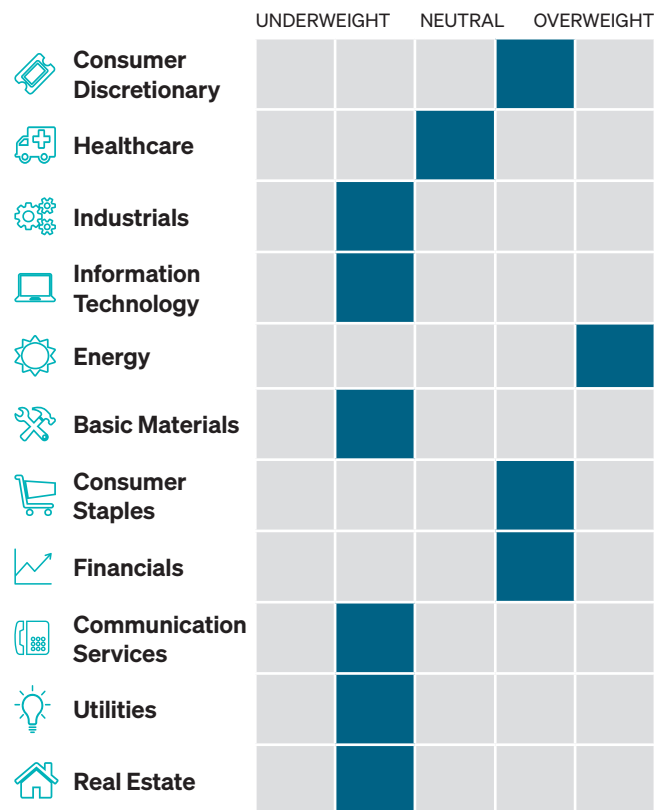
EQUITY ALLOCATION



STYLE EXPOSURE



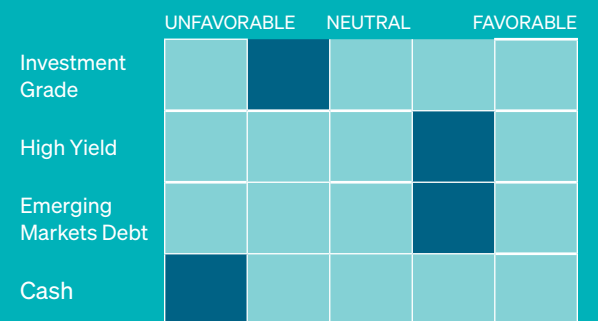
SECTOR PREFERENCES



MEEDER FIXED INCOME STRATEGY

The Meeder Fixed Income Strategy allocates the fixed income component of portfolios among exchange traded funds focusing on U.S. Government and agency securities, investment-grade bonds, high-yield corporate bonds and international debt. Employing a multi-factor model, the strategy covers both asset class and duration of fixed income funds held by the portfolios.

Fixed Income Exposure



Average Duration



LEARN MORE

Call 1.866.633.3371 for more information

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Asset allocation and diversification do not assure a profit or protect against loss. All investments carry a certain amount of risk and there is no guarantee that any strategy will achieve its investment objective.

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