Model Builder gives our users access to the most powerful strategy construction tools we have ever developed, making it much easier to build, backtest, analyze, and manage customizable, rules-based strategies. Users can leverage NDW's Relative Strength tools to create dynamic portfolios from universes of stocks, ETFs, mutual funds, and even other models. Choose the trading frequency that fits your schedule and set alerts to make trading and rebalancing straightforward and easy.

Common Uses of NDW's Custom Modeling Capability

- Variations of existing NDW Models altered to better fit you and your clients
  - Apply existing model rules to a different universe
  - Change model rules to alter a model's risk, return, and turnover profile
  - Add a cash component for downside protection
- Relative Strength leaders models from a stock index or a firm's recommended list
- Sector rotation strategies using ETFs
- Rules-based models for client 401ks and other unique universes
- Multi-factor portfolios combining NDW's Relative Strength with factors like value, income, and low volatility

Add a Top-Down Tactical Allocation Overlay

- Use Nasdaq Dorsey Wright's Dynamic Asset Level Investing (DALI) tool to systematically overweight asset classes exhibiting Relative Strength and underweight weaker asset classes
- Maintain minimum allocations to asset classes to keep your portfolio properly diversified
- Add a static sleeve within your tactical allocation to construct a portfolio with a core/satellite approach

View Detailed Performance Relative to a Benchmark

Generate Customizable Fact Sheets

- Add your own branding, commentary, and disclosures
- Select the specific model information and data to include
- Choose a benchmark and additional comparison model or fund to compare your model's performance

Stay in Compliance

- Limit your model's allocation to certain investment categories and cap its concentration in any one security
- Maintain a record of your model's trades and the reason each trade was triggered
- Make sure your model's universe is investible and matches the appropriate risk and return characteristics

Contact sales@dorseywright.com with questions or to discuss a subscription to the NDW Model Builder.