



RISK has turned negative as both the VIX and MOVE indices are above their long-term averages. Equity and bond market volatility has picked up significantly since the official tariffs announcement on April 2nd.



In line with increased market volatility, we continue to observe extreme bearish investor surveys, options activity, and newsletter sentiment. This level of bearish investor sentiment has typically formed around market bottoms historically.



Individual U.S. stock correlations have spiked to extreme levels which triggered an asymmetrical signal within our short-term model to turn positive.

OVERALL MODEL OUTPUT

LONG-TERM



INTERMEDIATE-TERM



SHORT-TERM



MARKET RISK



LOW RISK

HIGH RISK

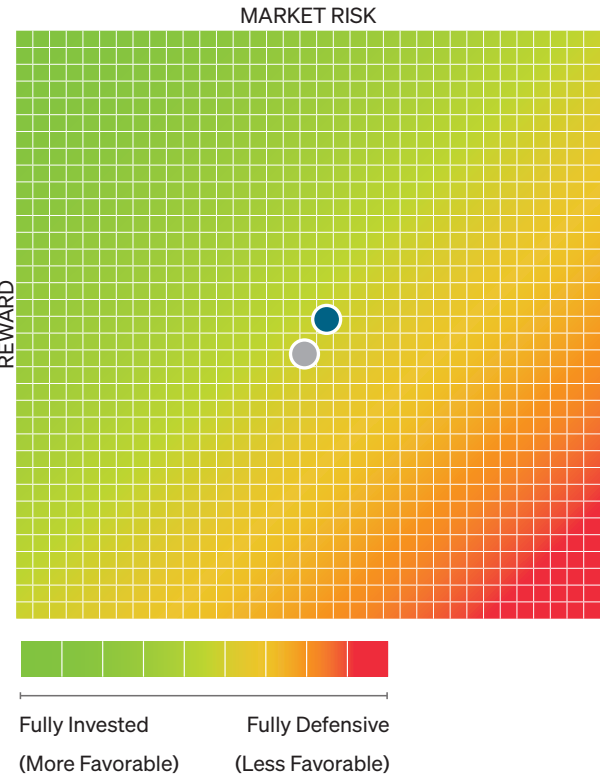


MEEDER

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.

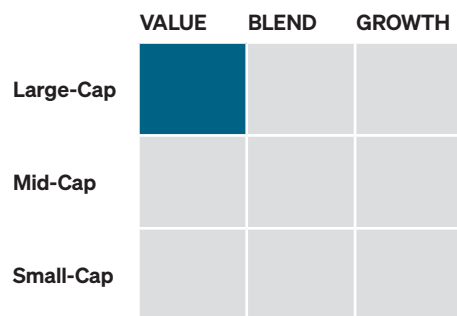
As of April 16, 2025 As of March 19, 2025

# Meeder Equity Strategy

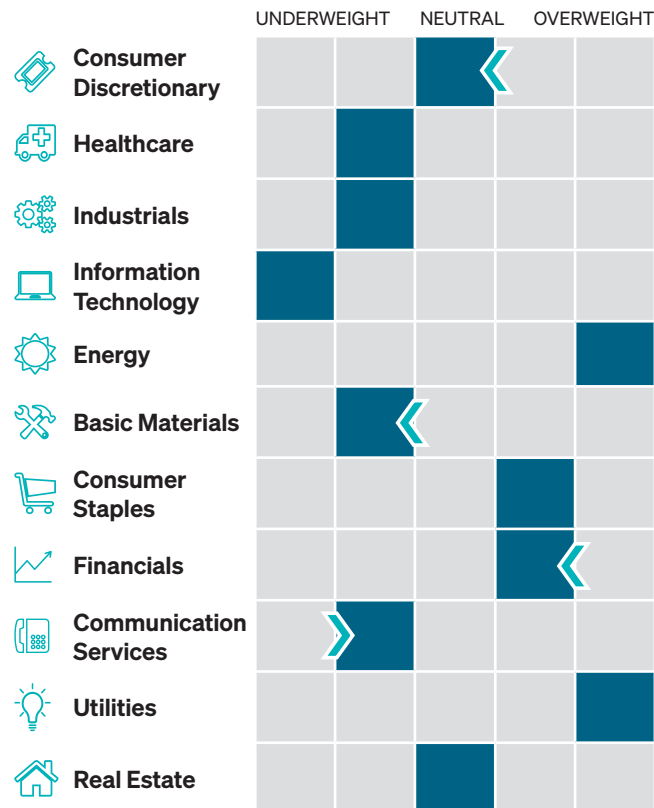
## EQUITY ALLOCATION



## STYLE EXPOSURE



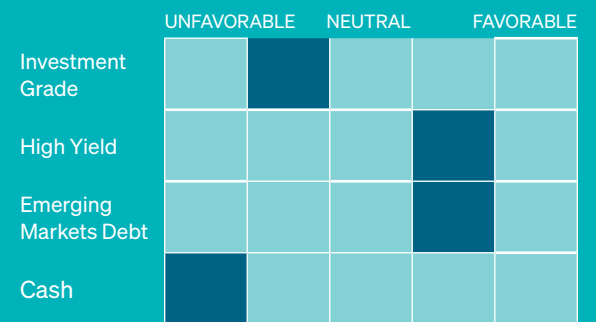
## SECTOR PREFERENCES



## 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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