



## ALIGNING YOUR CLIENTS' INVESTMENT PORTFOLIOS FOR THE CURRENT MARKET

[» Rallies Don't Look Like Rallies](#)

[» Inflation Following a Recession](#)

[» ICON Sector Insights](#)

**MORE INFO?** 1-800-828-4881 or [info@iconadvisers.com](mailto:info@iconadvisers.com)

For many investors, evaluating portfolio or investment models has been like riding a roller coaster – there have been many highs and lows over the last two years depending on the timing of when they looked at their investment positions. With the S&P 1500 gaining 27.23% in 2009, investors are happy to see portfolio values likely beginning to climb again.

However, we believe some of the investment strategies that may have worked during the rebound in global markets may no longer be optimal. For example, the flight to quality that drove many investors to cash and U.S. Treasuries last year may have much less appeal now.

At ICON, we believe it's important to examine investment portfolios or models at regular intervals to ensure they continue to meet investment objectives. When assessing your clients' portfolios, questions may center on your clients' asset allocation mix. For example, is their fixed income percentage allocation in line with their investment objectives, and what types of bonds (if any) are appropriate for their portfolio? Should their portfolios have more international exposure as global markets recover? Are focused investments in market sectors such as Energy or Health Care appropriate given the current climate?

As part of our continuing effort to provide value-added services to investment professionals, ICON's Regional Vice Presidents in the field and Internal Sales Associates at the home office have access to a Web-based version of **Zephyr StyleADVISOR on Demand** and can work with investment professionals one-on-one using this program.

Zephyr software is being used by investment professionals to gain a better understanding of the investment management process they are deploying with client assets. StyleADVISOR is a great tool for performing manager due diligence, building portfolios, or searching for managers who may be appropriate for your investment models or specific client accounts. StyleADVISOR's graphs and tables allow you to perform style, risk, performance, and peer group analysis on managers and custom blends.

For a demonstration of Zephyr StyleADVISOR and more information on how your ICON Regional Vice President or Internal Sales Associate can assist you with using ICON investment products and services, please contact the ICON Sales Desk at 1-800-828-4881.

Opinions and forecasts regarding sectors, industries, companies, countries and/or themes, and portfolio composition and holdings, are all subject to change at any time, based on market and other conditions, and should not be construed as a recommendation of any specific security, industry, or sector.

Investing in securities involves inherent risks, including the risk that you can lose the value of your investment. There is no assurance that the investment process will consistently lead to successful results. An investment concentrated in sectors and industries may involve greater risk and volatility than a more diversified investment.

Investing in fixed income securities such as bonds involves interest rate risk. When

interest rates rise, the value of fixed income securities generally decreases. High-yield bonds involve a greater risk of default and price volatility than U.S. Government and other higher-quality bonds.

Investments in international securities may entail unique risks, including political, market, regulatory and currency risks. In general, there is less governmental supervision of foreign stock exchanges and securities brokers and issuers.

Please be sure to contact your investment adviser to discuss your investment objectives, needs, and tolerance for risk.

As an investment professional, you are responsible for knowing your clients' needs, goals and tolerance for risk.

***Please visit ICON online at [www.iconadvisers.com](http://www.iconadvisers.com) or call 1-800-828-4881 for the most recent copy of ICON's Form ADV, Part II..***

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