

# FlexDirex: First-to-Market Single-Stock ETF Strategy SMAs

Introducing FlexDirex: Dynamically managed single-stock ETF SMAs. FlexDirex delivers a new way to think about ETF investing, offering single-stock strategies designed to give tactical management in dynamic markets. With Tech Plus and Focused Core, FlexDirex helps fine-tune exposure to leading equities through a tactically managed, risk-aware approach.

## A New Way to Think About ETF Investing

FlexDirex combines innovation, transparency, and dynamic oversight. Whether your clients hold QQQ, SPY, or other large-cap benchmarks, these strategies are designed to focus and strengthen your portfolio positioning.



### THE FLEXDIREX UNIVERSE



BERKSHIRE HATHAWAY INC.



## Tech Plus: For QQQ and Q investors

The Tech Plus strategy targets investors and advisers managing portfolios that include QQQ or Q. It provides a focused, tactically managed way to participate in the performance of major technology names, designed to manage volatility and concentration risk. Ideal for aggressive, growth investors seeking to enhance or hedge existing NASDAQ-heavy exposure.

## Focused Core: For SPY and VVO investors

The Focused Core strategy is designed for growth investors with exposure to SPY or VVO, offering a dynamic approach to focused, core U.S. equity positions. By emphasizing single-stock precision and tactical adjustments, Focused Core helps advisers pursue consistent returns and improved diversification, differentiating their client portfolios from the competition.

## Compare FlexDirex ETF strategies

	Tech Plus	Focused Core
Objective	High-conviction, technology-focused strategy	Diversified, actively managed core strategy
Portfolio focus	Fast-evolving tech-sector single-stock ETFs	Balanced portfolio of core single-stock ETFs
Dual-direction positioning	Captures returns from rising and falling top-performing stocks	Captures returns from upward and downward movements in core holdings
<b>Volatility targeting</b>	Targeted Volatility Analysis (TVA) tool manages risk relative to the volatility of the NASDAQ 100 Index	Targeted Volatility Analysis (TVA) tool manages risk relative to the volatility of the S&P 500 Index
Tactical risk overlay	Dynamically adjusts equity exposure during signaled market declines	Dynamically adjusts equity exposure when broader market weakness is signaled
Risk-return profile	Higher volatility, aggressive growth potential	Lower volatility target, focused growth potential

Both portfolios hold the exact same stocks. The difference in volatility is achieved by varying the hedged portion of the strategy.

**TECH PLUS**

**FOCUSED CORE**

**PORTFOLIO GROWTH**

## Why choose FlexDirex?



### FIRST-TO-MARKET INNOVATION:

The only actively managed single-stock ETF SMA strategies available in the U.S.



### TACTICAL ETF EXPERTISE:

A quantitative manager since its founding in 1981, FPI has applied its dynamic, risk-managed investing approach to ETFs since 2004.



### TARGETED VOLATILITY MANAGEMENT:

Each strategy is designed to align with the volatility of either the Nasdaq 100 or the S&P 500.



### ADVISOR-FOCUSED STRATEGIES:

The strategies are designed to help advisers differentiate their client portfolios from the competition.



**FLEXIBLE PLAN**  
INVESTMENTS

[Client Relationship Summary \(CRS\)](#) | [ADV Part 2A - Firm Brochure](#) | [Disclosures/Privacy Policy](#) | [Terms & Conditions](#) | [Sitemap](#)

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