

Story ideas from:



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5 Essentials for Smart Investing

Passive Investing and mimicking an Index as approaches are mightily shaken and the Black Swan event/current conditions have proven that they are not safe, cure-all, “set-it and forget it” solutions! Bottom line: You must have an active investing style.

1. **Use an SMA** (Separately Managed Account) so you can participate and adhere to a process, such as the Nepsis process (detailed below).
2. **Adhere to a philosophy.** Investors should invest like they are business owners – knowing what they own and why they own it. At Nepsis, Inc., believe in diversification, but not over-diversification, which is what you will often find with mutual funds and ETFs. We also believe that volatility creates opportunity and is needed for long-term investment success.
3. **Stick with a professionally-developed investment strategy.** At Nepsis, Inc., we utilize fundamental analysis, not market timing, and we invest in both secular and cyclical trends. Our portfolios consist of roughly 25-40 companies, allowing our research team to be selective.
4. **Be flexible.** At Nepsis, Inc., we leverage Strategic Cost Averaging®, an investment strategy that invests unequal monetary amounts timed to specific market and/or company events. This provides opportunities for an investor to purchase additional shares of a company over time.
5. **Demand transparency.** At Nepsis, Inc., our clients can see all of the activity in their accounts. We have committed relationships with multiple custodians that oversee our clients’ investments and assets.

Where to Put Your Money Considering All of the Volatility and Uncertainty

Volatility is our friend; it creates opportunity. During this pandemic, the dynamic between volatility and opportunity is exaggerated. At Nepsis, Inc., we focus on opportunities that exist with quality companies we think will thrive in the new normal, which to some degree, has already arrived. We are looking through a lens of the 5 C’s shown below.

THE 5 C’S OF POST COVID-19 OPPORTUNITY

1. **CASH TRANSACTIONS** giving way to Mobile Pay
2. Social distancing making way for **COMMERCE CHANGES**
3. The race for the **CURE** - Genomic immunology and battling future viruses
4. **CLOUD** data storage answering society’s needs, such as using our data in public places
5. **CYBERSECURITY** to protect our data

5 Reasons To Be Hopeful During this Corona Crisis

The resilience of our country is shining – innovation and leadership from all corners of our nation are coming together for the common good. The government, the Fed, business leaders, public and private healthcare officials, and our citizens, through non-profit and charitable efforts, are all rising to the occasion.

The efforts we are collectively making during these unprecedented times to both adapt and preserve our way of life, not only create positive change, they create unprecedented investing opportunities.

Adaption/Adoption is key. The investing rays of light at the end of the tunnel are woven into how we are changing the methods and means in which conduct our everyday life. For example:

1. How we play + how we pay: For instance gaming + cash transactions give way to Mobile Pay.
2. Social distancing makes way for commerce changes and staying connected: Think about the impact that Zoom, MS Teams, Zoho, Slack, and social media platforms has had on our society.
3. Race for the cure: Genomic immunology and research to prepare us for battling future viruses is on the front and center for our nation and our world.
4. Expanding cloud data storage: Needs to support the new normal have increased. For instance: how we can take/use our data to communicate and get work done in remote work places, arenas, houses of worship, etc.
5. Cyber security to protect our data: The bad guys are out there just waiting to fool the unsuspecting and/or to outright go after and steal important information.

Thought Leaders:



Mark Pearson, founder and Chief Investment Officer at Nepsis, Inc., is responsible for the firm's strategic vision, research and trading decisions. His experience in the hi-tech and financial services industry dates back to 1986. Since then, his fervid passion for portfolio management compelled him to develop a unique back-to-basics investment philosophy. He founded Anchor Capital Management in 1994, which he later renamed Nepsis, Inc. By tying motivation and investment together, Pearson helps investors find clarity and prepare their financial futures. He is a well-known industry speaker, having spoken at engagements with *Financial Advisor* magazine and conferences and the Financial Planning Association. He was also received a cover feature story in TD Ameritrade Institutional's *Solutions Magazine* for his excellence in technology and client service.



Chuck Etzweiler, MBA, CIMA®, CFP®, CMT, Senior Vice President of Research at Nepsis, Inc., has more than twenty-five years of investment industry experience. Etzweiler directs the ongoing research efforts of the firm. Prior to joining Nepsis, he worked as Chief Market Strategist for True North Global Research and as a Securities Analyst with both Wells Fargo and the Bank of Hawaii. Additionally, Chuck holds his CFP® and Chartered Market Technician credentials. Chuck is a graduate of Syracuse University and also has earned his MBA in Finance.

An SEC Registered Investment Advisor, Nepsis, Inc. is located in Minneapolis.