



PRESS RELEASE

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QUANTIFIED STF FUND REPEATS AS TOP PERFORMER IN CATEGORY

The Quantified STF Fund Tops Morningstar Category for Fourth Time in Eight Years

Bloomfield Hills, MI, January 13, 2025 – [Flexible Plan Investments, Ltd.](#) (FPI), a leading provider of dynamic, risk-managed investment solutions with over \$1.5 billion in assets under management (12/31/24), announced that its Quantified STF Fund (QSTFX) was the top performer in the Morningstar Tactical Allocation category (246 funds) in 2024 returning 29.94%. Additionally, the fund sits atop the category (213 funds) for the five-year period ended 12/31/24.

It is a repeat performance for the fund as it also led the category in 2023. The fund outpaced its benchmark, the NASDAQ 100® Index, that returned 25.88% for the past calendar year. It is the fourth time the fund has led its category in the past eight years (2017, 2020, 2023, 2024). The fund was in the bottom decile of performance for its category during the calendar years 2016, 2018, and 2022.

“The repeat performance in 2024 of the STF fund is a result of our team’s ability to identify and capitalize on trends while also enhancing our model to evolve with the markets and volatility. The fact that the fund leads in the category for the five-year period, as well, speaks to our objective to provide consistency and predictability in our strategies. STF can be positioned up to two-times long versus the NASDAQ 100® Index and up to one-times short, depending upon market direction and conditions. While sometimes volatile, the ability to go long and short is part of our dynamic, risk management approach,” said Jerry Wagner, founder and president of FPI and one of the portfolio managers for the 14 Quantified Funds. Mr. Wagner further added “Flexible Plan uses the fund extensively in its most popular dynamic, risk-managed SMA strategy: QFC Self-Adjusting Trend Following. Although the fund is aggressive and has even found itself ranked for some years at or near the bottom of its category, using the strategy version reduces its volatility. Another popular FPI strategy, QFC Equity Trends, further reduces the volatility to allow its use with growth investors. Finally, investors with a wide range of suitability profiles can make use of the fund in FPI’s Multi-Strategy Portfolios – available for Conservative, Moderate, Balanced, Growth and Aggressive suitability profiles.”

With respect to the 14 Quantified Funds, Flexible Plan is a subadvisor to [Advisors Preferred](#), a boutique asset manager that manages mutual funds. Advisors Preferred, through its affiliated distributor, Ceros Financial Services, Inc., distributes these funds to financial advisors and financial professionals.

“We’re thrilled that the STF Fund repeated as the top performer in its category this past year. Knowing that no two years are the same in the markets, we believe this accomplishment speaks to the adaptable, dynamic approach that Flexible Plan employs and shows that strategies like

this have a place in professionally managed portfolios,” said Catherine Ayers-Rigsby, president of Advisors Preferred.

The table below shows the fund’s overall performance as of December 31, 2024:

	Quarter	1 year	5 Year (Annualized)	Since Inception 11/13/15 (Annualized)
QSTFX	4.66%	29.94%	20.98%	16.32%
NASDAQ 100® Index	4.93%	25.88%	20.18%	19.52%

Total annual fund operating expenses for QSTFX: 1.69%

The performance data quoted represents past performance. Past performance does not guarantee future results. Investment return and principal value will fluctuate, so that shares, when redeemed, may be worth more or less than their original cost.

Current performance may be lower or higher than the performance data quoted and assumes the reinvestment of any dividend or capital gains distributions. To obtain performance data current to the most recent month-end please call toll free 888.572.8868 or access www.quantifiedfunds.com

For more information about the Quantified Funds, visit www.quantifiedfunds.com, www.flexibleplan.com, or www.advisorspreferred.com.

About Flexible Plan Investments, Ltd.

Established in 1981, Flexible Plan Investments, Ltd., invests over \$1.5 billion in assets for clients in its separately managed account business (as of December 31, 2024). As early pioneers of separately managed accounts employing dynamic investment risk management, the company’s mission is to provide investors with competitive returns, while reducing risk through the use of dynamic risk management, strategic diversification, and cutting-edge technology and support services. For more information, visit www.flexibleplan.com

About Advisors Preferred LLC

Advisors Preferred acts as the advisor in a sub-advised structure. The firm collaborates with investment management firms to launch unique and innovative products by providing a turn-key solution that includes product consultation, market intelligence, marketing support, product placement, sales reporting, compliance services, and advanced trading. For more information, visit www.advisorspreferred.com.

Ceros Financial Services, Inc., member FINRA/SIPC, serves as distributor to the funds and is a commonly held affiliate of Advisors Preferred. Advisors Preferred and Ceros are not affiliated with the funds’ sub-advisers.

Past performance does not guarantee future results.

Investing in mutual funds involves risk, including loss of principal. Risks specific to the Quantified and Gold Bullion Strategy Funds are detailed here: www.quantifiedfunds.com/fund-documents and www.goldbullionstrategyfund.com/index.php/investor-materials. The Funds' prospectuses have additional details regarding the risks and should be read carefully.

There is no guarantee any investment strategy will generate a profit or prevent a loss. There is no guarantee the funds will achieve their investment objectives.

An investor should carefully consider the investment objectives, risks, charges and expenses of the Funds before investing. This and other information can be found in the funds' prospectus and summary prospectus, which can be obtained by calling 1-855-650-7453. The prospectus should be read carefully prior to investing.

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As of 12/31/24, the fund was ranked #1 in the Morningstar Tactical Allocation category out of 246 funds for the 1-year period and out of 213 funds for the 5-year period based on total returns. Rankings are based on historical performance and are subject to change.

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