The Winsor Trail Group at Morgan Stanley

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The Power 5 Strategy

What is the Power 5?

The Power 5 Strategy focuses on what we believe to be the strongest areas of the market, using technical and fundamental analysis to capture growth and manage risk. By overweighting upward trends and avoiding weaker areas, it aims to deliver superior long-term performance.

Our Strategy

Designed for investors seeking to maximize returns by focusing on the strongest market segments. The discretionary strategy combines market insights with proactive decision-making to potentially drive long-term success, focusing on these 5 areas of the market as of September 2025.

- Technology
- Industrials
- Financials
- Utilities
- International Equities

Market Overweighting

The strategy emphasizes the allocation of more capital to sectors or stocks that demonstrate robust performance. By concentrating investments in these high-potential areas, the strategy seeks to enhance overall portfolio returns.

Technical Analysis

Utilizes technical indicators to identify upward trends and momentum in specific sectors or stocks. Key technical signals may include moving averages, relative strength indexes (RSI), and other momentum indicators that suggest continued price appreciation.

Fundamental Analysis

Focuses on companies with strong revenue and sales growth, indicating a healthy business model and market demand. Positive earnings growth is a critical factor, as it reflects a company's ability to generate profits and create shareholder value.

Accumulation Indicators

Identifies companies that are under accumulation, suggesting that institutional investors or large shareholders are buying shares. This can serve as a bullish signal, indicating confidence in the company's future performance.

Risk Management

The strategy also involves underweighting or avoiding sectors and stocks that show signs of downward trends or weak fundamentals. By minimizing exposure to underperforming areas, the strategy aims to protect capital and reduce overall portfolio volatility.

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Because of their narrow focus, sector investments tend to be more volatile than investments that diversify across many sectors and companies.

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