

# Symmetry and Fidelity: Factor-Based Meets Active



Have you ever heard the saying, “Different doesn’t mean better; it just means different?” When it comes to investing, there are plenty of differences in philosophies and strategies. If you aren’t committed to one view, an opportunity exists to benefit from multiple strategists by pairing them together.

Pairing strategists is easy with Orion Communities, a robust investment model marketplace providing unprecedented access to leading brand, boutique, and emerging strategists. Easily review models with advanced filters, pair strategists who align with your investment philosophy, update your portfolios using Orion’s trading tools, and retain full trading authority to reject or accept future strategist model changes.

This month we look at the benefits of pairing Fidelity, a well-known active strategist focused on identifying current opportunities, with Symmetry, a boutique strategist building broadly diversified portfolios rooted in academic research.

## **Brand Strategist: Fidelity “Active Investing With the Cycle”**

- Fidelity is a brand name well-known to clients. They take a more active investment management approach by identifying opportunities in the current business cycle.
- Fidelity’s broad lineup of models includes asset allocation portfolios, income focused models, and more targeted individual stock separately managed accounts.
- The models utilize Fidelity active and passive funds to keep costs low while adding to potential alpha generation in asset allocation and the

security selection process.

- Portfolios are allocated based on risk-adjusted return expectations using Fidelity's time tested, active management expertise while being mindful of turnover and expenses.

### **Boutique Strategist: Symmetry “Factor-Based, Broad Diversification With a Tilt”**

- Symmetry is a boutique manager whose models provide a more passive, broad based, well diversified, factor-based exposure for your portfolios.
- They have a large selection of asset allocation portfolios targeting a specific equity level, which also comes in a tax-managed flavor.
- While the portfolios are broadly diversified, similar to more passive managers, factors serve as the foundation of Symmetry's investment strategy. They continually review the leading academic work on factors, and select holdings they believe are well established sources of return above the markets.
- Symmetry is a model option for representing a core exposure in a diversified portfolio, keeping costs and taxes in mind, and pairing well with more actively managed allocations.

Orion's Communities include forty Fidelity models and over 20 Symmetry models. Log in now to access valuable information for both strategists, including fact sheets, marketing materials, and more.

Not yet a subscriber? Let us provide you with a demo of Orion Communities.

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