



Think direction. Invest.

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Q Describe your firm, its offerings and its mission.

At Direxion, our driving focus is providing innovative investment products that enable sophisticated advisors and investors to implement dynamic tactical portfolio strategies.

Who we are:

- A pioneer in providing alternative investment strategies to sophisticated advisors and investors.
- Consistent product innovators, with a diverse suit of tactical investment products.
- We enable a wider range of investors to employ strategies historically used only by institutional investors.
- Our goal is to offer investment vehicles that help clients effectively manage risk and returns in today's changing market conditions.

Q Describe your investment strategy and how it might be unique.

What We Believe:

- We believe opportunities exist in all market conditions. We provide a growing number of tactical investment options designed to help capitalize on this potential.
- We understand that market direction matters. We strive to offer an alternative to static investment strategies while delivering exposure to the various markets in which investors have high levels of interest.
- Sophisticated investors use our products to take advantage of short-term market movements and opportunities. Our most important role is to complement core investment strategies, not to replace them.
- We are committed to product innovation. Our DirexionShares ETFs represent the highest amount of

leverage currently available in the ETF space and are the industry's first 300% leveraged ETFs.

Q Describe how your investment products fit into a well-rounded asset allocation strategy.

Our Funds:

- Core Strategy Mutual Funds provide traditional asset allocation with built-in tactical strategies that adjust to short-term trends.
 - Direxion/Wilshire Dynamic Fund
- Managed Tactical Mutual Funds offer long/short exposure to alternative assets.
 - Global IPO, Commodities, Currencies
- Tactical Trading Funds offer magnified benchmark exposure for investors who actively manage their trading positions.
 - 1x, 2x, and 3x Daily Leveraged ETFs
 - 2x Monthly Leveraged Mutual Funds
- High Yield Bond Funds provide liquid long and/or short exposure to the high yield market, helping investors seek equity-like returns with less volatility.
 - Dynamic HY Bond Fund
 - HY Bear Fund

AT A GLANCE

Firm name: Direxion

Employees: 35

Location: Newton, MA

Years in business: 15

Assets under management: \$8.0 Billion

Minimum investment: \$1,000