



ALGORITHMIC  
INVESTMENT  
MODELS



## **Algorithmic Investment Models (AIM) Completes Acquisition of Beaumont Capital Management (BCM)**

*After a 10-year partnership, the investment technology, investment management and client service functions will operate as one business to better serve advisors and investors.*

**BOSTON, Mass. – February 1<sup>st</sup>, 2022** – Algorithmic Investment Models (AIM), a financial technology firm and early adaptor in applying artificial intelligence (AI) to portfolio management, announced today that it completed the acquisition of its distribution partner, Beaumont Capital Management (BCM), which has \$3.5 billion in AUM and AUA as of 12/31/21. Since 2012, BCM has been offering the global, tactical allocation strategies powered by AIM technology and known as Decathlon. As of 12/31/21, the Decathlon strategies manage over \$3 billion in AUM and AUA. BCM and AIM will become wholly owned subsidiaries of Algorithmic Research and Trading, LLC (ART), a newly created holding company, and will continue to manage existing business under the BCM brand.

“The acquisition of BCM is an exciting step forward for both firms,” said Todd Rice, founder of AIM and inventor of the underlying technology powering BCM’s Decathlon strategies. “We anticipate the combination will accelerate growth and innovation, leading to new AI-based financial products.”

Todd Rice has been in the financial services industry for decades, developing investment products and managing quantitative and fundamental investment strategies. He is a pioneer in applying AI and quantitative methods to financial markets and, along with new Advisory Board member Gordon Bennett, holds two patents in genetic algorithms used in the underlying Decathlon technology.

Todd Rice and AIM partner, Andrew Rice, will become the managing partners of the holding company as well as join the investment committee for the Decathlon products. Denis Rezendes and Brendan Ryan, former partners and Portfolio Managers of BCM, will be partners in the holding company as well as continue their role as Portfolio Managers for BCM strategies. All other BCM employees will report to Todd Rice and Andrew Rice and will have stock in the holding company, ART. Dave Haviland, managing partner of BCM, will be retiring.

“We are excited to join the team with Todd and Andrew, who we’ve been working closely with for years,” said Brendan Ryan. “We are committed to continuing to deliver the same quality of client service and portfolio management our clients are used to with the newly added benefit of AIM’s quantitative toolkit.”

While BCM has historically represented the portfolio management and distribution efforts of the Decathlon strategies, AIM has been the engine behind the strategies since the inception of the partnership, providing the research and technology that power the Decathlon strategies.

There will be minimal changes to the personnel and no major changes to the management of the strategies.

### **About Algorithmic Investment Models (AIM)**

Algorithmic Investment Models, LLC (AIM), currently undergoing registration with the State of Massachusetts, is a technology company focused on creating financial products designed using proprietary machine learning technology. For the last decade, AIM has provided a suite of global, go-



ALGORITHMIC  
INVESTMENT  
MODELS



anywhere, actively managed financial products, called Decathlon, through investment management partner Beaumont Capital Management. AIM has also developed a proprietary data mining software package that allows for rapid customization and performance analysis, and the ability to continuously identify novel factors, many of which to our knowledge are first discoveries unique to AIM.

### **About Beaumont Capital Management (BCM)**

Beaumont Capital Management (BCM), an SEC Registered Investment Advisor powered by Algorithmic Investment Models (AIM), is an asset manager that provides AI-based portfolio solutions designed to give investors a smoother ride. Leveraging machine learning, quantitative research, and behavioral finance, BCM strategies seek to remove emotion from the investment process and enhance risk-adjusted returns. These ETF-based products can provide a tactical edge when paired with a standard strategic allocation portfolio. Additionally, we have a suite of proprietary quantitative tools and machine learning capabilities that can be employed to develop custom solutions for RIAs and institutional investors.

For Additional information, please contact:

### **Contacts**

Investors and Advisors:

Brendan Ryan

Partner and Portfolio Manager

[bryan@investbcm.com](mailto:bryan@investbcm.com)

Media:

Courtney Doyle

Director of Marketing

[cdoyle@investbcm.com](mailto:cdoyle@investbcm.com)

For information purposes only and should not be construed as investment, tax accounting, or legal advice, or as an offer to sell or a solicitation offer to buy any securities or strategies offered by Beaumont Capital Management, LLC or Algorithmic Investment Models, LLC. Offers of securities or investment advisory services may be made only pursuant to appropriate offering or other disclosure documents, and only after prospective investors have had the opportunity to discuss all matters concerning the prospective investment or engagement with their adviser. No Guarantee or representation can be made that an investment will generate profits or that an investment will not incur a total loss of investment capital.