

InvePress Printable Reports

With the InvePress plugin in WordPress, you can easily create fund websites and make print-ready stuff with fund info charts, like fund fact sheets, presentations, yearly, quarterly, monthly, or weekly updates, and other investment reports.

Difficulty Level

1 2 3 4 5 6 7

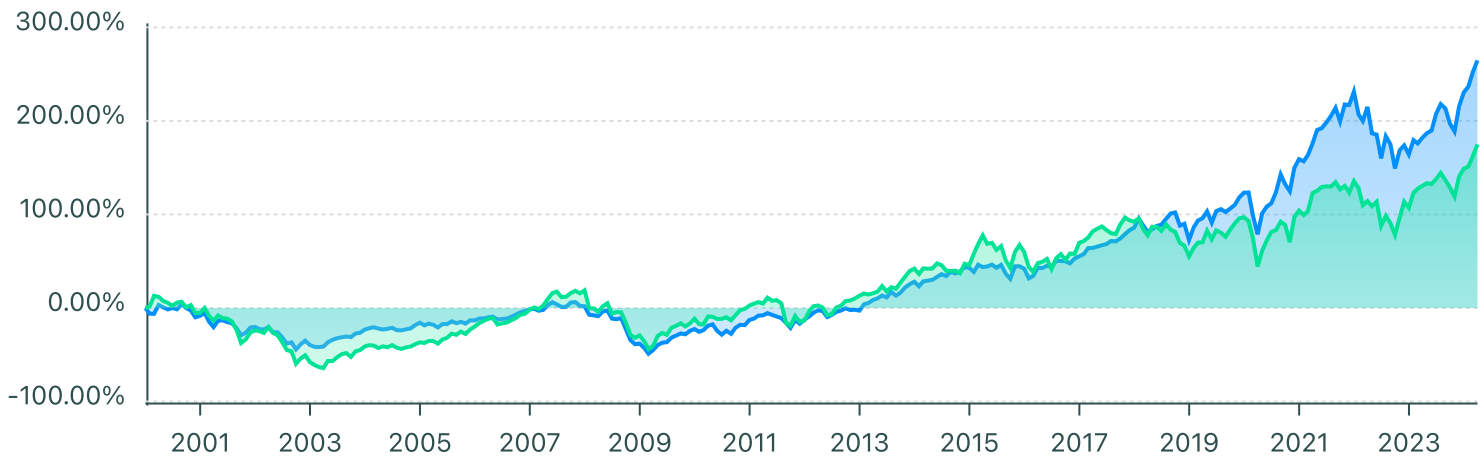
Where 1 is super easy and 7 is hard.

Key Facts

Investment Charts and Data Tables	Included
Automated Calculations	Included
Editing method	Build-in Gutenberg Editor
Multilingual Capability	Included
Price	\$33 / month, billed annually (\$396 ex. tax)
Payment methods	Credit Card, PayPal
Reseller	Freemius Inc.

Performance Line Chart block and Performance Table blocks

● Bull's Horn Fund Share Class A USD ● Bear's Claw Fund Share Class C USD



Data beginning: Jan 3, 2000 As of: Mar 31, 2024

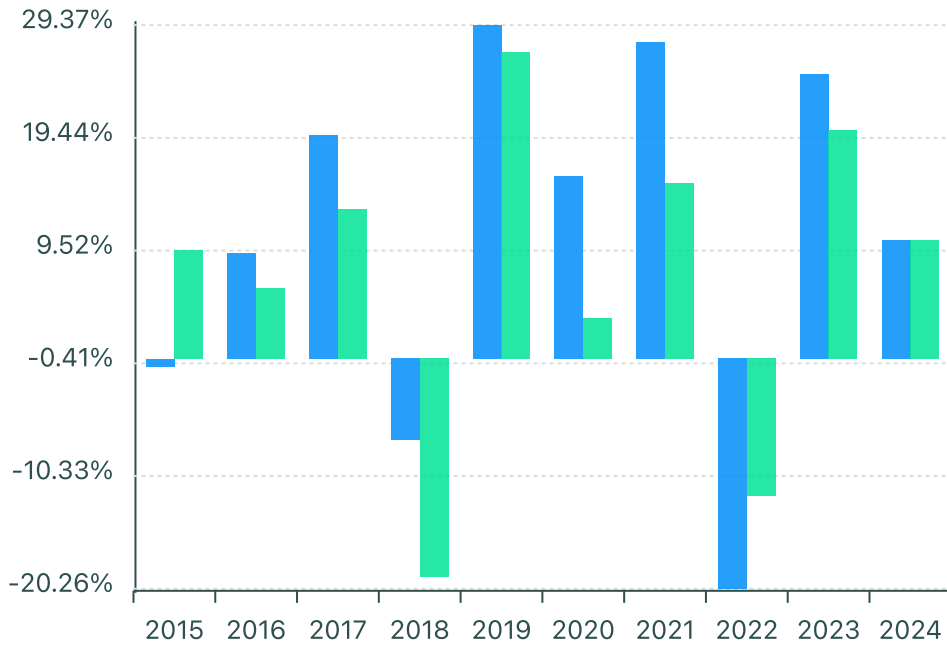
Cumulative Returns

	Bull's Horn Fund Share Class A USD	Bear's Claw Fund Share Class C USD
24 months Mar 31, 2022 Mar 28, 2024	+15.79%	+28.22%
36 months Mar 31, 2021 Mar 28, 2024	+32.24%	+23.34%
60 months Mar 29, 2019 Mar 28, 2024	+86.07%	+61.41%
120 months Mar 31, 2014 Mar 28, 2024	+182.16%	+93.53%
Since inception Jan 3, 2000 Mar 28, 2024	+264.71%	+174.80%

Annualized Returns

	Bull's Horn Fund Share Class A USD	Bear's Claw Fund Share Class C USD
24 months Mar 31, 2022 Mar 28, 2024	+7.63%	+13.27%
36 months Mar 31, 2021 Mar 28, 2024	+9.78%	+7.26%
60 months Mar 29, 2019 Mar 28, 2024	+13.22%	+10.04%
120 months Mar 31, 2014 Mar 28, 2024	+10.93%	+6.83%
Since inception Jan 3, 2000 Mar 28, 2024	+5.48%	+4.26%

Performance Bar Chart block



- Bull's Horn Fund Share Class A USD
- Bear's Claw Fund Share Class C USD

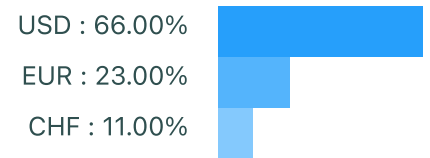
Data beginning: Dec 31, 2014 As of: Mar 28, 2024

Statistics Table block

Alpha	1.75%
Beta	0.2574
R-squared	16.45%
Tracking Error	22.54%
Standard Deviation	4.38%
Sharpe Ratio	0.4509
Information Ratio	-0.0967

Data beginning: May 31, 2023 As of: Mar 31, 2024

Breakdown Chart block



As of: Jun 14, 2023

Performance Table block

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan-Dec
2020	+0.08%	-11.16%	-9.97%	+12.50%	+3.67%	+1.64%	+5.66%	+8.48%	-4.37%	-3.19%	+11.15%	+3.69%	+16.03%
2021	-0.88%	+2.58%	+4.68%	+5.24%	+0.69%	+2.01%	+2.37%	+2.87%	-4.64%	+6.07%	-0.17%	+4.51%	+27.88%
2022	-7.38%	-2.24%	+4.99%	-8.96%	-0.47%	-8.92%	+9.11%	-3.06%	-9.37%	+7.79%	+1.95%	-3.51%	-20.26%
2023	+5.79%	-1.28%	+2.20%	+1.75%	+0.94%	+6.15%	+3.41%	-1.44%	-5.16%	-2.85%	+9.25%	+4.73%	+25.04%
2024	+1.96%	+4.47%	+3.63%										+10.39%

Data beginning: Dec 31, 2019 As of: Mar 28, 2024

DISCLAIMER

Keep in mind, WordPress isn't made for print publishing like InDesign or Publisher, but with Printable Reports block you can get good results with a little effort.

For more information about InvePress plugin please visit: invepress.com website.

Breakdown Table and Chart Blocks

Citigroup	9.42%
JPMorgan Chase	9.23%
Bank of America	8.33%
Wells Fargo	8.15%
US Bancorp	7.82%
Northern Trust	4.71%
Bank of New York Mellon	4.55%
Capital One Financial	4.51%
State Street	4.32%
PNC Financial Services	4.02%

As of: Jun 14, 2023



- Stocks : 40.00%
- Bonds : 27.00%
- Futures : 21.00%
- Cash : 12.00%

As of: Jun 14, 2023