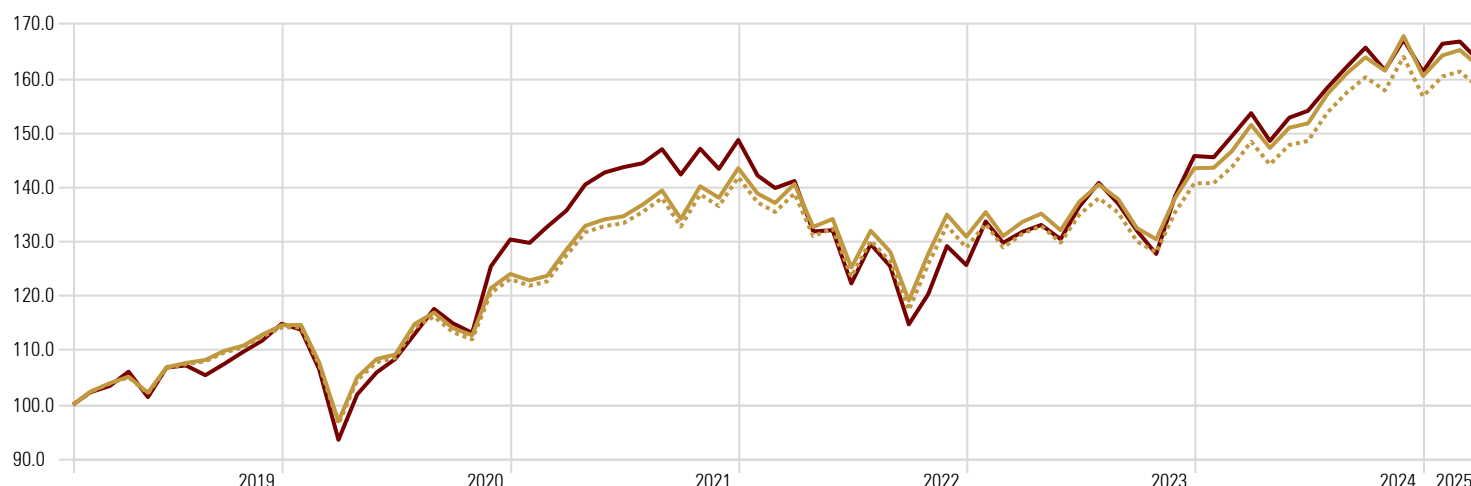


# iSectors Enhanced Growth Allocation



## Investment Growth



— iSectors Enhanced Growth Allocation (Gross)

.... iSectors Enhanced Growth Allocation (Net)

— Morningstar Mod Agg Tgt Risk TR USD (Gross)

Investment Type	Separate Account	Inception Date	2/1/2019
Primary Prospectus Benchmark	Morningstar Mod Agg Tgt Risk TR USD	Max Strategist Fee	0.40
Morningstar Category	US SA Moderate Allocation	Morningstar SeclD	F000012CUF

## Investment Strategy

The objective of the iSectors® Enhanced Growth Allocation is to provide long-term growth of capital and limited income. This allocation blends 20% to a short-term ladder bond strategy and 60% to a fundamental equity strategy focused on owning stocks of multinational companies that have increased their dividends every year for many consecutive years with a 20% satellite allocation to iSectors® exclusive Post-MPT dynamic strategy. An allocation to Bitcoin is included to improve risk-adjusted returns.

## Trailing Returns

Calculation Benchmark: Morningstar Mod Agg Tgt Risk TR USD

	YTD	1 Year	3 Years	5 Years	10 Years	15 Years	Since Incept.
iSectors Enhanced Growth Allocation (Gross)	1.10	7.10	4.88	10.86	—	—	8.17
iSectors Enhanced Growth Allocation (Net)	1.00	6.67	4.47	10.42	—	—	7.74
Morningstar Mod Agg Tgt Risk TR USD	1.17	6.21	4.95	11.78	7.42	8.18	8.27

## Risk Statistics

Time Period: 2/1/2019 to 3/31/2025

	Inv		Bmk1
	Gross	Net	
Std Dev	12.27	12.27	14.16
Correlation	0.96	0.96	1.00
Alpha	0.69	0.29	0.00
Sharpe Ratio	0.49	0.46	0.45
Max Drawdown	-16.98	-17.23	-22.82
Max Drawdown Peak Date	1/1/2022	1/1/2022	1/1/2022
Max Drawdown Valley Date	9/30/2022	9/30/2022	9/30/2022
Max Drawdown # of Periods	9.00	9.00	9.00
Calmar Ratio	0.48	0.45	0.36

Source: Morningstar Direct

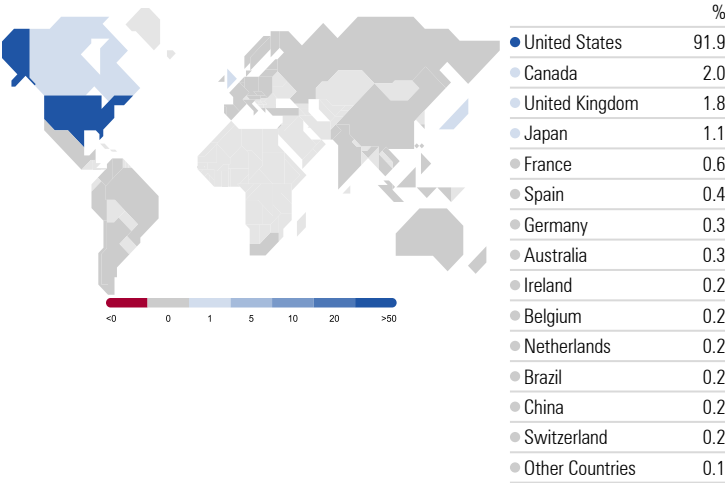
iSectors Enhanced Growth Allocation



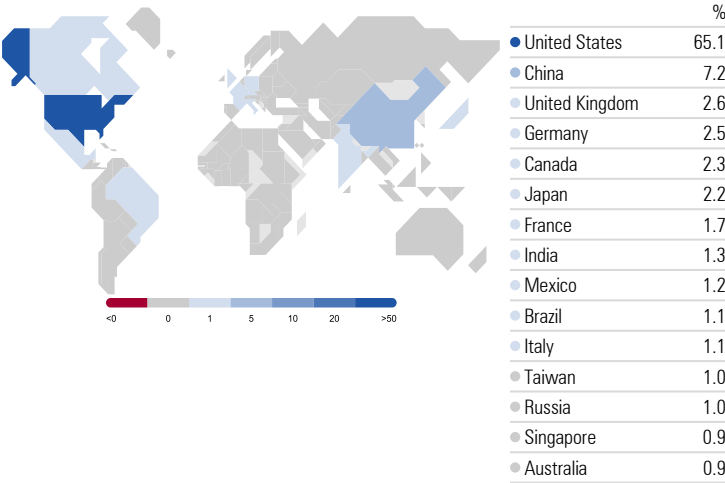
Fixed-Inc Country Exposure

Revenue Exposure by Country

Portfolio Date: 3/31/2025



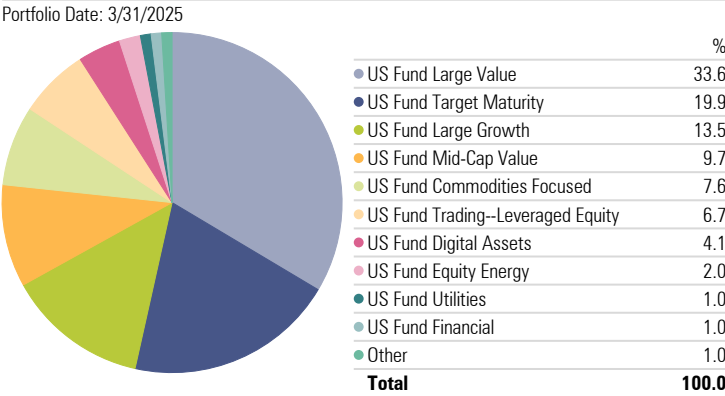
Portfolio Date: 3/31/2025



Snapshot - iSectors Enhanced Growth Allocation

Asset Allocation

Fixed Income Surveyed Style Box	<input checked="" type="checkbox"/>
Leveraged Fund	No
Domicile	United States
# of Holdings	27
Turnover Ratio %	50.00
Morningstar Category	US SA Moderate Allocation



Operations

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