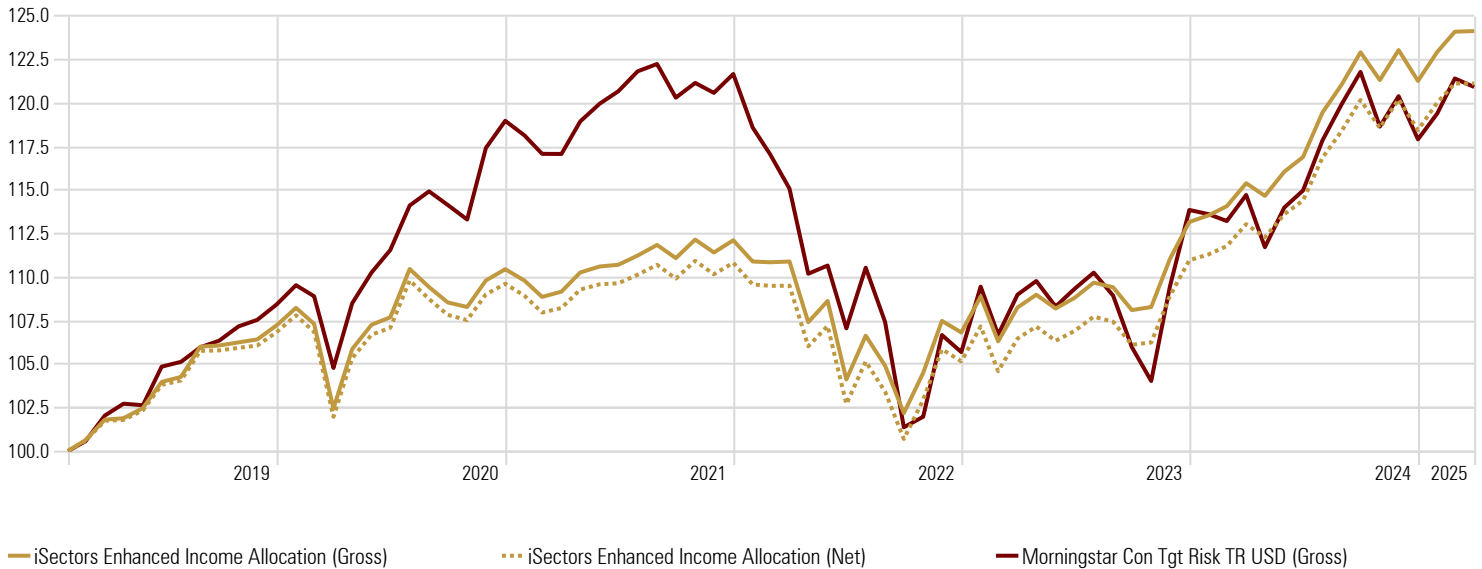


iSectors Enhanced Income Allocation



Investment Growth



Investment Type	Separate Account	Inception Date	2/1/2019
Primary Prospectus Benchmark	Morningstar Conservative Tar Risk TR USD	Max Strategist Fee	0.40
Morningstar Category	US SA Short-Term Bond	Morningstar SeclD	F000013C89

Investment Strategy

The objective of the iSectors® Enhanced Income Allocation is to provide capital preservation along with income in excess of money market funds. This allocation blends 80% to a sophisticated short-term ladder bond strategy 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 Con Tgt Risk TR USD

	YTD	1 Year	3 Years	5 Years	10 Years	15 Years	Since Incept.
iSectors Enhanced Income Allocation (Gross)	2.36	7.59	3.84	3.92	—	—	3.57
iSectors Enhanced Income Allocation (Net)	2.26	7.16	3.42	3.51	—	—	3.16
Morningstar Con Tgt Risk TR USD	2.55	5.41	1.67	2.91	3.06	3.65	3.13

Risk Statistics

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

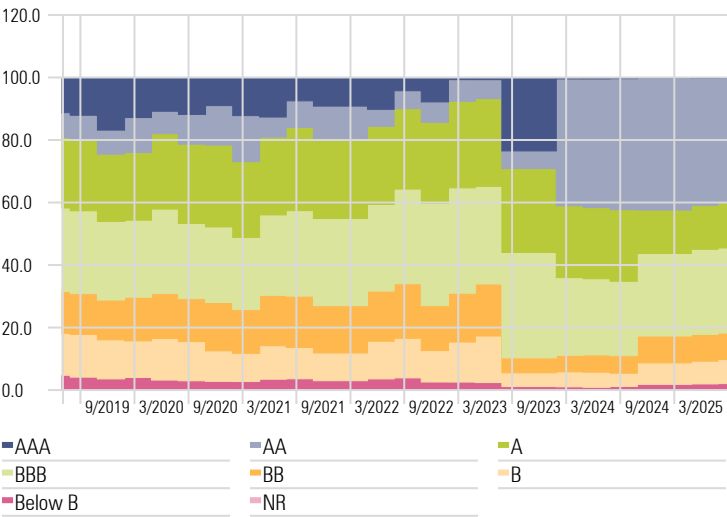
	Inv		Bmk1
	Gross	Net	
Std Dev	5.10	5.10	7.11
Correlation	0.89	0.89	1.00
Alpha	0.58	0.18	0.00
Sharpe Ratio	0.21	0.13	0.10
Max Drawdown	-8.90	-9.24	-17.09
Max Drawdown Peak Date	11/1/2021	11/1/2021	9/1/2021
Max Drawdown Valley Date	9/30/2022	9/30/2022	9/30/2022
Max Drawdown # of Periods	11.00	11.00	13.00
Calmar Ratio	0.40	0.34	0.18

Source: Morningstar Direct

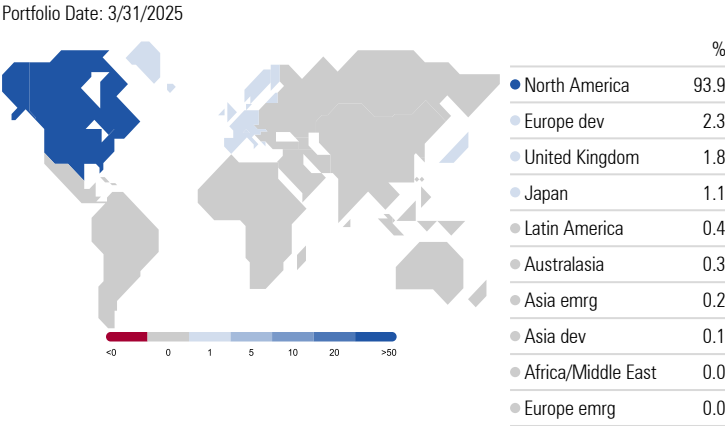
iSectors Enhanced Income Allocation



Fixd-Inc Credit Rtg - iSectors Enhanced Income Allocation



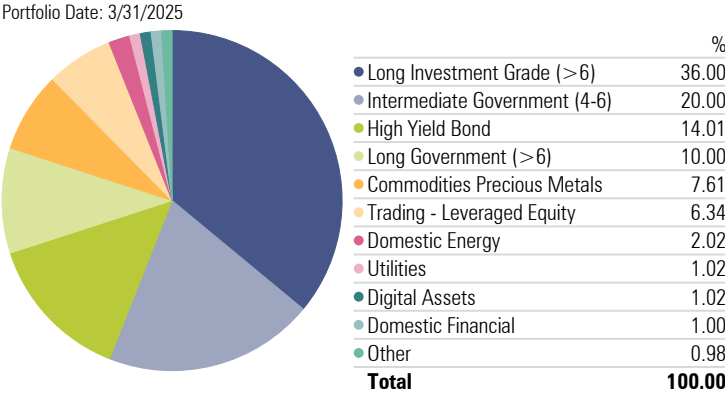
Fixed-Inc Region Exposure - iSectors Enhanced Income Allocation



Snapshot - iSectors Enhanced Income Allocation

Fixed Income Surveyed Style Box	<input checked="" type="checkbox"/>
Leveraged Fund	No
Domicile	United States
# of Holdings	19
Current Yield	4.13
Average Eff Duration	3.10
Average Credit Rating	BBB+
Turnover Ratio %	102.00
Morningstar Category	US SA Short-Term Bond

Portfolio Holdings - iSectors Enhanced Income Allocation



Operations - iSectors Enhanced Income Allocation

Manager Name	John Koch, CFA
Firm Phone	8004732867
Firm Web Address	www.isectors.com
Firm Street Address	5485 W. Grande Market Drive, Suite D,
Firm City	Appleton
Firm State or Province	WI

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