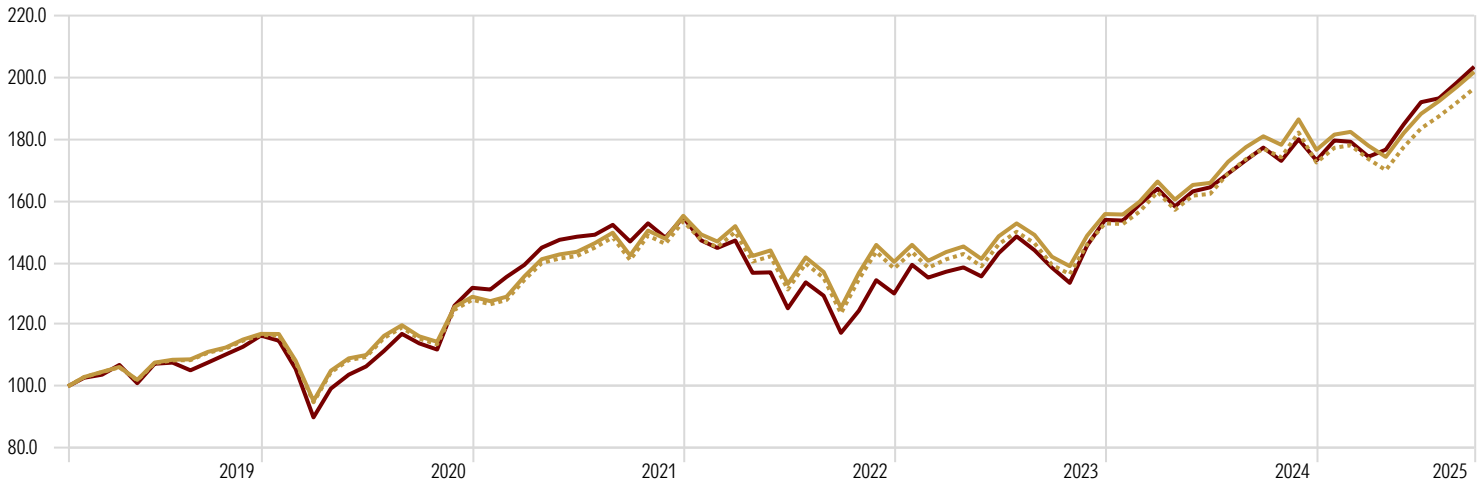


iSectors Enhanced Aggressive Allocation



Investment Growth



— iSectors Enhanced Aggressive Allocation (Gross)

... iSectors Enhanced Aggressive Allocation (Net)

— Morningstar Agg Tgt Risk TR USD (Gross)

Investment Type	Separate Account	Inception Date	2/1/2019
Primary Prospectus Benchmark	Morningstar Agg Tgt Risk TR USD	Max Strategist Fee	0.40
Morningstar Category	US SA Aggressive Allocation	Morningstar Secl	F000012CGN

Investment Strategy

The objective of the iSectors® Enhanced Aggressive Allocation Strategy is to provide long-term growth of capital with market levels of downside risk. This allocation blends 80% to a fundamental equity strategy focused on owning stocks of large 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 Agg Tgt Risk TR USD

	YTD	1 Year	3 Years	5 Years	10 Years	15 Years	Since Incept.
iSectors Enhanced Aggressive Allocation (Gross)	14.28	11.51	17.16	11.66	—	—	11.09
iSectors Enhanced Aggressive Allocation (Net)	13.94	11.07	16.69	11.22	—	—	10.65
Morningstar Agg Tgt Risk TR USD	17.50	14.76	20.13	12.29	11.06	10.26	11.23

Risk Statistics

Time Period: 2/1/2019 to 9/30/2025

	Inv		Bmk1
	Gross	Net	
Std Dev	14.46	14.46	15.77
Correlation	0.96	0.96	1.00
Alpha	0.75	0.35	0.00
Sharpe Ratio	0.61	0.59	0.58
Max Drawdown	-19.16	-19.41	-24.15
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	0.58	0.55	0.47

Source: Morningstar Direct

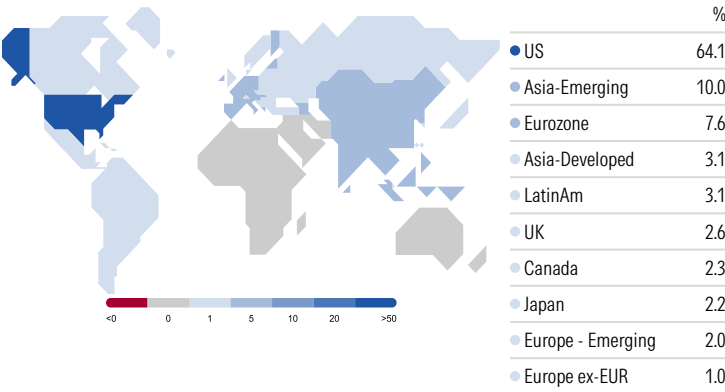
iSectors Enhanced Aggressive Allocation



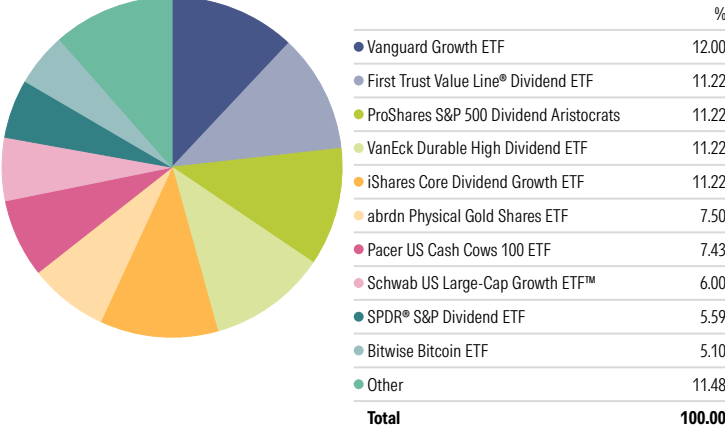
Revenue Exposure by Region - iSectors Enhanced Aggressive Allocation

Top Holdings

Portfolio Date: 9/30/2025



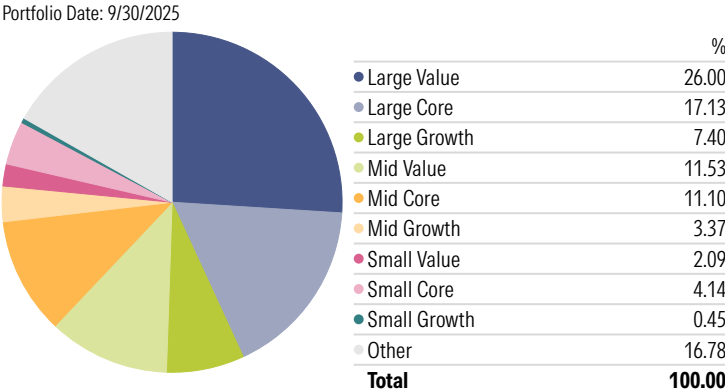
Portfolio Date: 9/30/2025



Snapshot - iSectors Enhanced Aggressive Allocation

Equity Style - iSectors Enhanced Aggressive Allocation

Leveraged Fund	No
Domicile	United States
# of Holdings	17
Turnover Ratio %	33.00
Morningstar Category	US SA Aggressive Allocation



Operations - iSectors Enhanced Aggressive Allocation

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