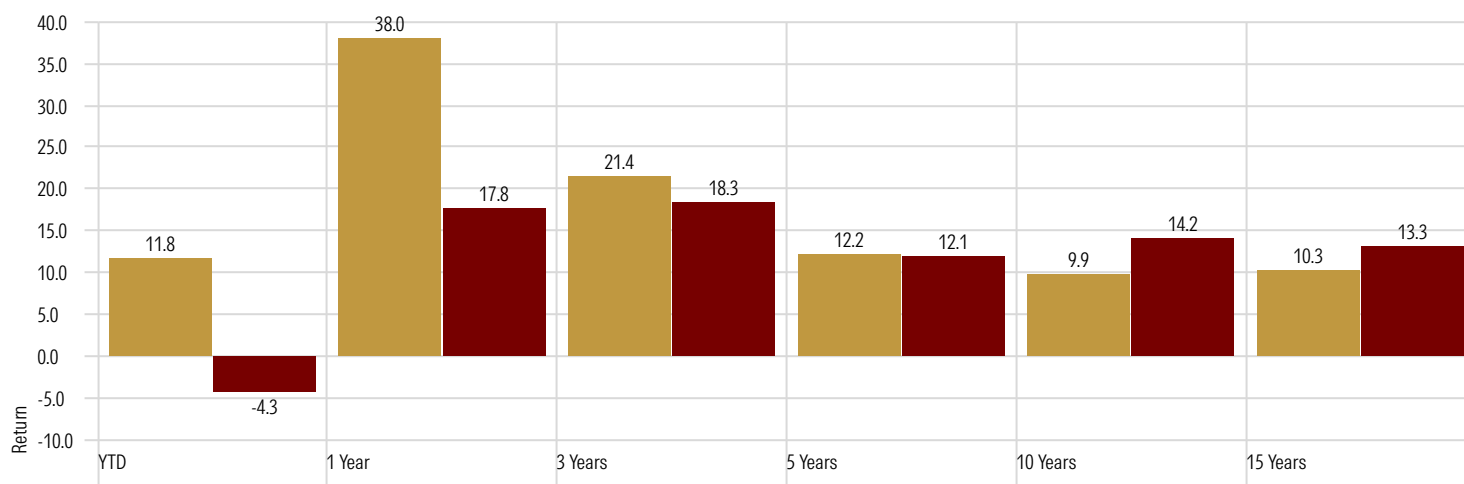


iSectors Post-MPT Growth Allocation



Returns

Calculation Benchmark: S&P 500 TR USD



■ iSectors Post-MPT Growth Allocation

■ S&P 500 TR USD

Investment Type	Separate Account	Inception Date	2/1/2005
Primary Prospectus Benchmark	S&P 500 TR USD	Max Strategist Fee	0.50
Morningstar Category	US SA Moderate Allocation	Morningstar Secl	FOUSA088RG

Investment Strategy

The objective of the iSectors® Post-MPT Growth Allocation is to achieve market returns with lower downside risk over a complete market cycle. The portfolio manager re-optimizes the portfolio's risk adjusted returns monthly. This is done by reallocating the portfolio among 9 low-correlated market sectors, using a quantitative process, guided by monthly changes in two dozen economic and capital market factors. Portfolios may be invested up to 30% at any one time into any single sector, except for government bonds, which may allocate up to 50%.

Trailing Returns

Calculation Benchmark: S&P 500 TR USD

	YTD	1 Year	3 Years	5 Years	10 Years	15 Years	Since Incept.
iSectors Post-MPT Growth Allocation (Gross)	11.91	38.67	22.03	12.79	10.42	10.87	9.68
iSectors Post-MPT Growth Allocation (Net)	11.78	38.00	21.43	12.23	9.87	10.32	9.13
S&P 500 TR USD	-4.33	17.80	18.32	12.06	14.16	13.29	10.51

Risk Statistics

Time Period: 2/1/2005 to 3/31/2026

	Inv		Bmk1
	Gross	Net	
Std Dev	13.53	13.53	14.81
Correlation	0.64	0.64	1.00
Alpha	2.90	2.40	0.00
Sharpe Ratio	0.62	0.58	0.63
Max Drawdown	-33.62	-34.07	-50.95
Max Drawdown Peak Date	11/1/2007	11/1/2007	11/1/2007
Max Drawdown Valley Date	2/28/2009	2/28/2009	2/28/2009
Max Drawdown # of Periods	16.00	16.00	16.00
Calmar Ratio	0.29	0.27	0.21

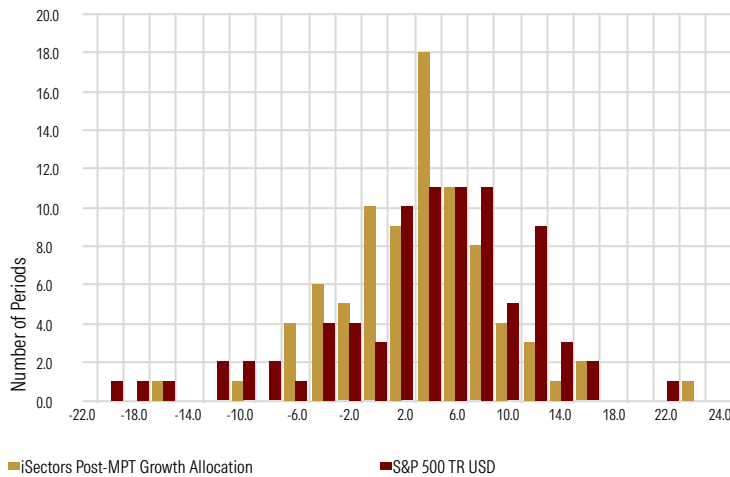
Source: Morningstar Direct

iSectors Post-MPT Growth Allocation



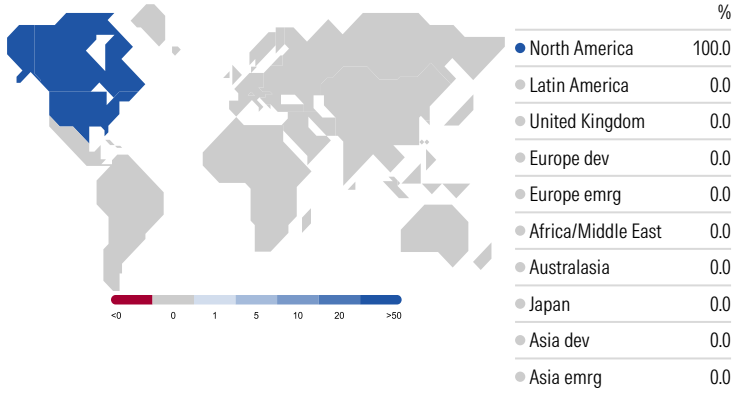
Frequency Distribution of Quarterly Returns

Time Period: Since Inception to 3/31/2026



Equity Regional Exposure - iSectors Post-MPT Growth Allocation

Portfolio Date: 3/31/2026

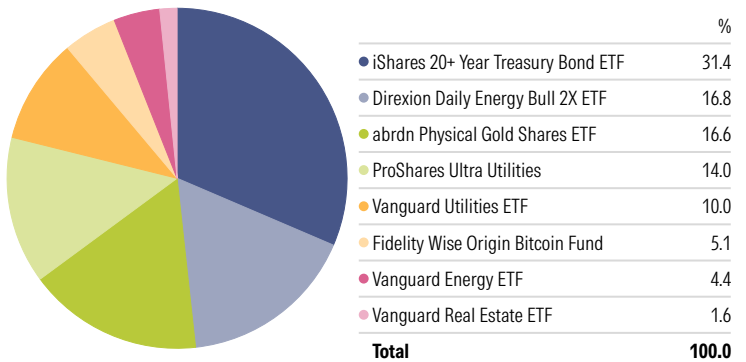


Snapshot - iSectors Post-MPT Growth Allocation

Uses Leveraged ETFs	No
Domicile	United States
# of Holdings	9
Turnover Ratio %	152.00
Morningstar Category	US SA Moderate Allocation

Portfolio Holdings - iSectors Post-MPT Growth Allocation

Portfolio Date: 3/31/2026



Operations - iSectors Post-MPT Growth Allocation

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