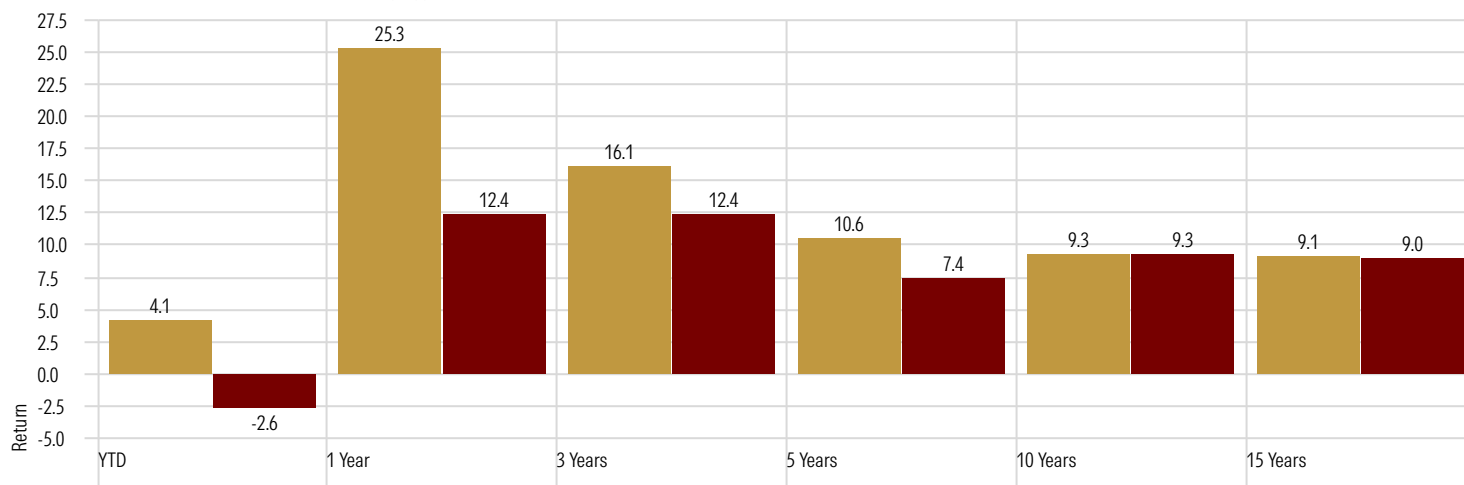


iSectors Post-MPT Moderate Allocation



Returns

Calculation Benchmark: 60% S&P 500 40% Bloomberg Agg Bond



■ iSectors Post-MPT Moderate Allocation

■ 60% S&P 500 40% Bloomberg Agg Bond

Investment Type	Separate Account	Inception Date	3/3/2008
Primary Prospectus Benchmark	60% SP 500 Index / 40% Barclays Agg	Max Strategist Fee	0.50
Morningstar Category	US SA Moderate Allocation	Morningstar Secl	F00000GY73

Investment Strategy

The objective of the iSectors® Post-MPT Moderate Allocation is to achieve moderate investment returns with lower downside risk over a complete market cycle. The 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 2 dozen economic and capital market factors. Portfolio 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: 60% S&P 500 40% Bloomberg Agg Bond

	YTD	1 Year	3 Years	5 Years	10 Years	15 Years	Since Incept.
iSectors Post-MPT Moderate Allocation (Gross)	4.26	25.92	16.66	11.12	9.85	9.64	8.07
iSectors Post-MPT Moderate Allocation (Net)	4.13	25.30	16.08	10.57	9.30	9.10	7.53
60% S&P 500 40% Bloomberg Agg Bond	-2.62	12.35	12.36	7.41	9.26	9.04	8.16

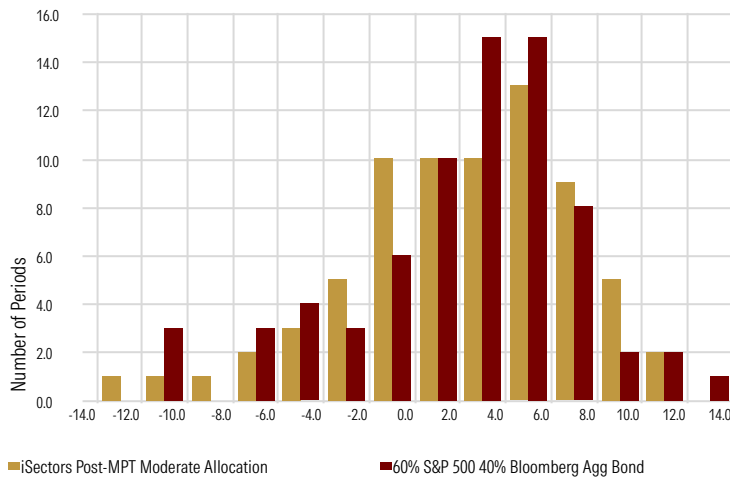
Risk Statistics

Time Period: 3/1/2008 to 3/31/2026

	Inv		Bmk1
	Gross	Net	
Std Dev	11.02	11.02	9.99
Correlation	0.73	0.73	1.00
Alpha	1.41	0.91	0.00
Sharpe Ratio	0.64	0.59	0.70
Max Drawdown	-24.65	-25.04	-29.90
Max Drawdown Peak Date	3/1/2008	3/1/2008	6/1/2008
Max Drawdown Valley Date	2/28/2009	2/28/2009	2/28/2009
Max Drawdown # of Periods	12.00	12.00	9.00
Calmar Ratio	0.33	0.30	0.27

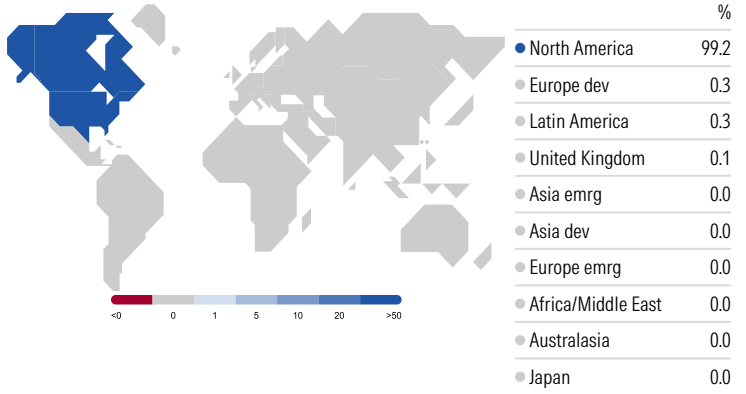
Frequency Distribution of Quarterly Returns

Time Period: Since Inception to 3/31/2026



Equity Regional Exposure - iSectors Post-MPT Moderate Allocation

Portfolio Date: 3/31/2026

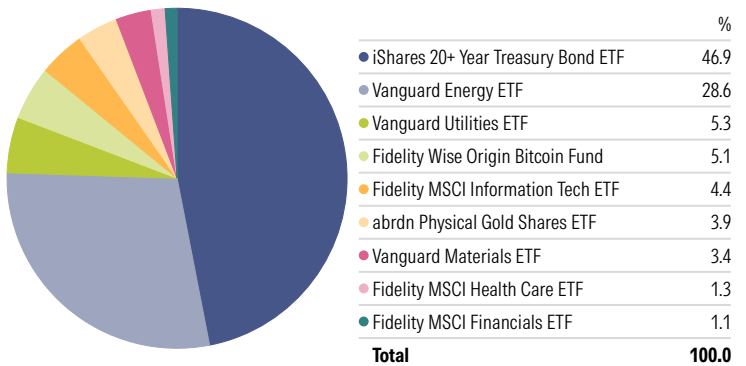


Snapshot - iSectors Post-MPT Moderate Allocation

Uses Leveraged ETFs	No
Domicile	United States
# of Holdings	10
Turnover Ratio %	80.00
Morningstar Category	US SA Moderate Allocation

Portfolio Holdings - iSectors Post-MPT Moderate Allocation

Portfolio Date: 3/31/2026



Operations - iSectors Post-MPT Moderate Allocation

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