

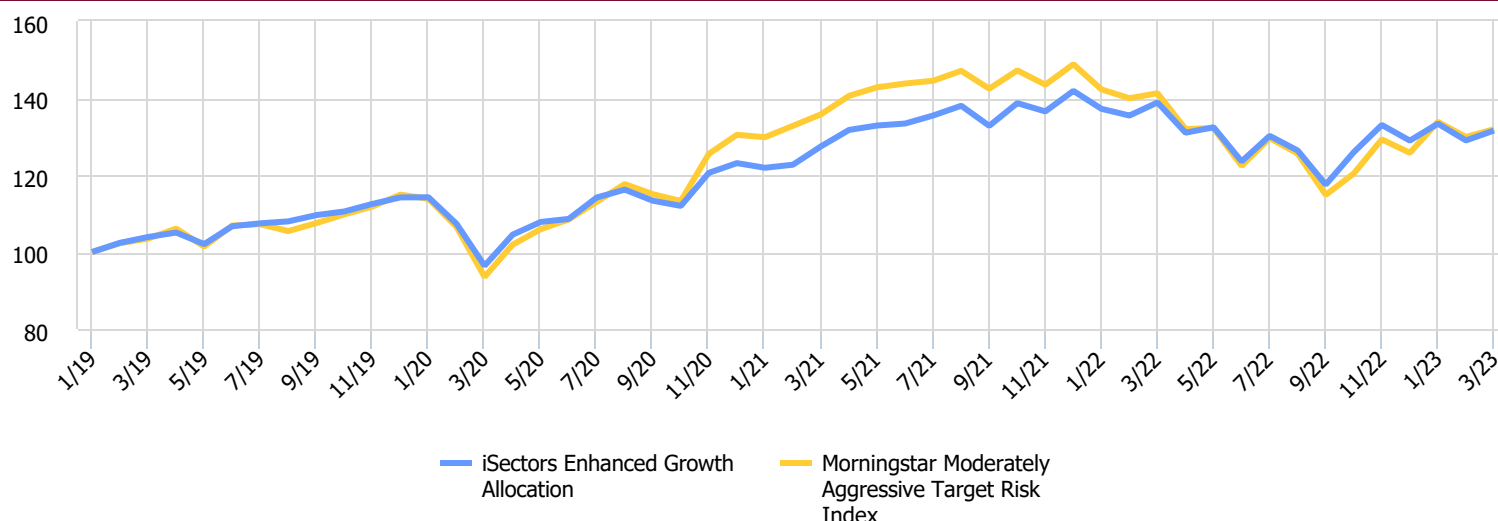
iSectors® Enhanced Growth Allocation

3/2023



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 sophisticated short-term laddered bond strategy and 60% 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 our exclusive dynamic strategy, the iSectors® Post-MPT Growth Allocation. This dynamic satellite strategy reoptimizes its portfolio allocation each month based on an objective quantitative algorithm that considers monthly changes in 15 economic and capital market factors. The portfolio is intended for investors willing to accept some risk in exchange for greater growth potential and a long-term time horizon. This advanced multifaceted allocation model, though sophisticated and complex, is developed using low cost, highly liquid and transparent index-based ETFs and maintained monthly by iSectors® expert investment professionals.

Growth of \$100 Investment



| | | | |
|----------------|---|---|------------|
| Investor Type: | Moderately Aggressive | Portfolio Inception: | 2/1/2019 |
| Benchmark 1: | Morningstar Moderately Aggressive Target Risk Index | Maximum Manager Fee: | 0.40% |
| Availability: | Separately & Unified Managed Account | Estimated Net Underlying Vehicle Costs: | 0.25% |
| | | Morningstar ID: | F000012CUF |

| Product Name | Returns MRQ | Returns 1 Year | Returns 3 Years | Returns 5 Years | Returns 10 Years |
|---|-------------|----------------|-----------------|-----------------|------------------|
| iSectors Enhanced Growth Allocation | 2.03 | -5.25 | 10.91 | --- | --- |
| Morningstar Moderately Aggressive Target Risk Index | 4.88 | -6.61 | 12.14 | 5.82 | 7.11 |

| Risk Stats: Since Inception | iSectors Enhanced Growth Allocation | Morningstar Moderately Aggressive Target Risk Index | Product | BM |
|-----------------------------|-------------------------------------|---|---------|-------|
| Returns | 6.80 | 6.87 | 2022 | -9.10 |
| Cumulative Returns | 31.55 | 31.90 | 2021 | 15.24 |
| Correlation to BM | 0.96 | 1.00 | 2020 | 7.80 |
| Annualized Alpha vs. BM | 0.93 | 0.00 | 2019 | --- |
| Sharpe Ratio | 0.41 | 0.36 | 2018 | --- |
| Sortino Ratio | 0.60 | 0.53 | 2017 | --- |
| Standard Deviation | 13.43 | 15.46 | 2016 | --- |
| Max Drawdown | 17.17 | 22.82 | 2015 | --- |
| | | | 2014 | --- |
| | | | 2013 | --- |

Performance and data in this illustration are presented net of underlying vehicle costs and iSectors' management fee. Presentation not complete without more detailed fee information and other disclosures located on the reverse side.

Past performance is not necessarily indicative of future results.

Not Guaranteed. Not Insured. May Lose Value.

| Monthly Returns | | | | | | | | | | | | | |
|-----------------|-------|-------|--------|-------|-------|-------|------|-------|-------|-------|-------|-------|-------|
| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Year |
| 2023 | 3.41 | -3.27 | 2.00 | --- | --- | --- | --- | --- | --- | --- | --- | --- | 2.03 |
| 2022 | -3.28 | -1.27 | 2.51 | -5.65 | 1.08 | -6.70 | 5.38 | -2.93 | -7.01 | 7.18 | 5.62 | -3.06 | -9.10 |
| 2021 | -0.98 | 0.66 | 3.89 | 3.35 | 0.87 | 0.39 | 1.57 | 1.87 | -3.78 | 4.45 | -1.55 | 3.91 | 15.24 |
| 2020 | 0.03 | -6.02 | -10.15 | 8.37 | 3.16 | 0.74 | 5.12 | 1.80 | -2.47 | -1.19 | 7.67 | 2.10 | 7.80 |
| 2019 | --- | 2.39 | 1.47 | 1.12 | -2.86 | 4.56 | 0.70 | 0.48 | 1.51 | 0.87 | 1.77 | 1.51 | 14.18 |

| Portfolio Characteristics | Domestic Equity Allocation (60%) | Domestic Fixed Income (20%) | Post-MPT Growth Allocation (20%) |
|--|----------------------------------|---------------------------------|----------------------------------|
| Management Style: Dynamic | Large Cap Dividend | Laddered Inv. Grade Corp. Bonds | Energy |
| Leverage: Leveraged ETFs - Limited to 7% | Large Cap Growth | High Yield Corp. Bonds | Gold |
| Portfolio Type: Core U.S. | Sm/Mid Dividend | Treasuries | Healthcare |
| Geographic Universe: Domestic | Sm/Mid Growth | Cash | Utilities |
| Securities Universe: ETFs | Cash | | Materials |
| Current # of ETFs: 22 | | | Technology |
| 12-Month Yield: 2.27% | | | Treasuries |
| | | | Cash |

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Disclosure

General

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