

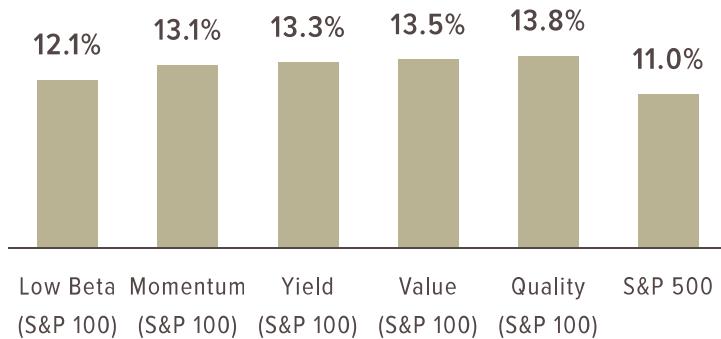
## The Approach

A quantitatively-driven strategy emphasizing high quality large-cap stocks. Stocks are first screened to remove those that score poorly on financial and growth measures. Those stocks that remain are then ranked on a stand-alone basis in relation to five different factors: beta;\* momentum; yield; value; and quality. The stocks that rank the highest for each factor are combined into one portfolio. Stocks that rank high in multiple factors are over-weighted.

## The Features

A concentrated portfolio of fewer than 60 stocks that seeks to deliver superior risk-adjusted returns over the index. The investment objective of the fund is capital appreciation. Our research, as well as a large body of academic research, has found that the 5 factors selected for the portfolio are associated with long-term stock outperformance.

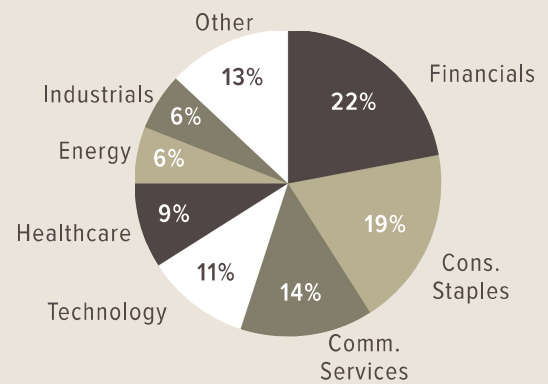
## Annual Return - Dec. 1990 - Dec. 2024



## Key Facts

Strategy Assets — \$90 Million  
Holdings — 53  
\*Beta (Ex-Ante) — 0.77  
Active Share — 70%  
Min Portfolio Size — \$50,000

## Sector Weightings



## Top 5 Holdings (% weight)

AT&T	4.2%
Verizon	3.5%
Nvidia	3.2%
Capital One Financial	3.1%
American Express	3.0%

\*Beta; Active Share from Bloomberg PORT

\*Beta = (Ex-Ante) is a forward-looking measure of the market risk of the portfolio relative to its benchmark. The beta of the benchmark is equal to 1.

Source: Addepar as of Dec. 2024; Bloomberg as of Dec. 2024

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