

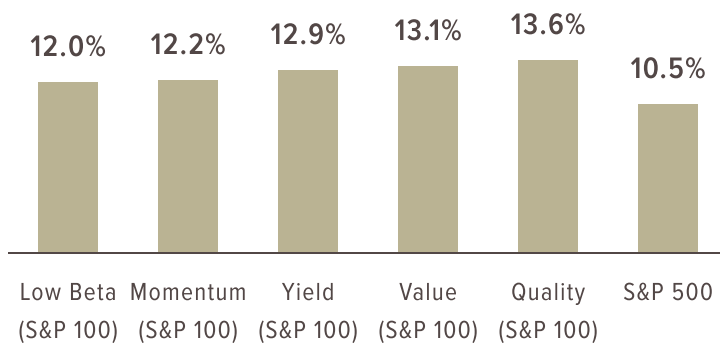
The Approach

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- Jun 2023

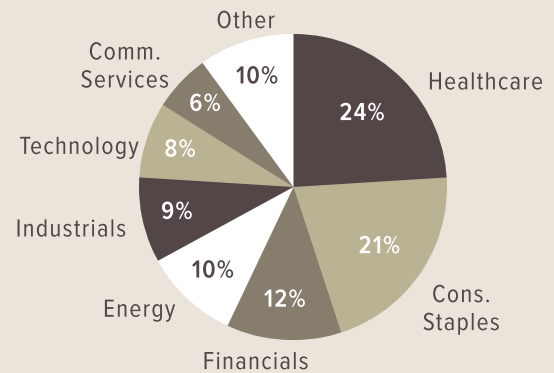


Source: FactSet as of June 2023; Bloomberg as of June 2023

Key Facts

Strategy Assets	— \$76 Million
Holdings	— 47
*Beta (Ex-Ante)	— 0.71
Active Share	— 76%
Min Portfolio Size	— \$50,000
Benchmark	— S&P 500 (Total Return)

Sector Weightings



Top 5 Holdings (% weight)

Eli Lilly & Co.	3.8%
Gilead Sciences	3.8%
Altria Group	3.8%
Chevron	3.7%
Abbvie Inc	3.7%

*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 June 2023; Bloomberg as of June 2023

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