

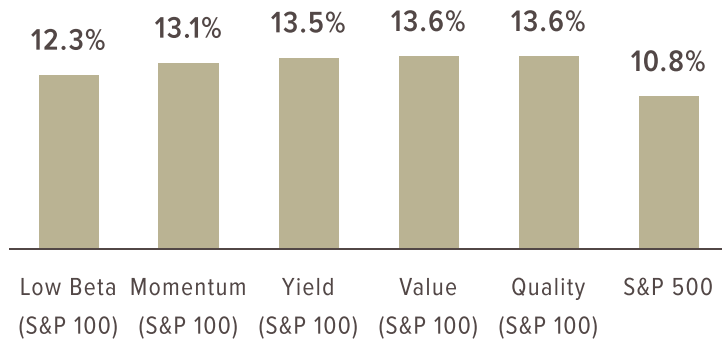
The Approach

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.

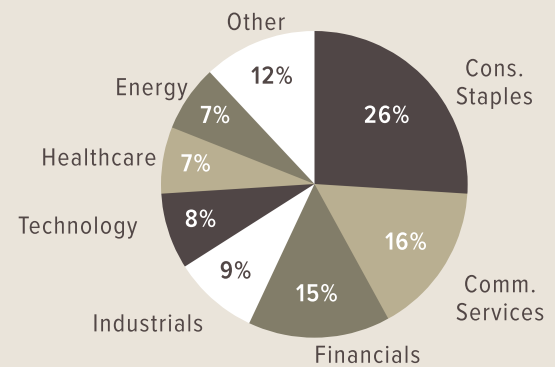
Annual Return - Dec. 1990 - Mar. 2025



Key Facts

Strategy Assets — \$88 Million
Holdings — 50
*Beta (Ex-Ante) — 0.69
Active Share — 73%
Min Portfolio Size — \$50,000

Sector Weightings



Top 5 Holdings (% weight)

AT&T	5.5%
Altria Group	5.3%
Philip Morris Int'l	5.1%
Verizon	4.1%
Pepsico	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 Mar. 2025; Bloomberg as of Mar. 2025

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