

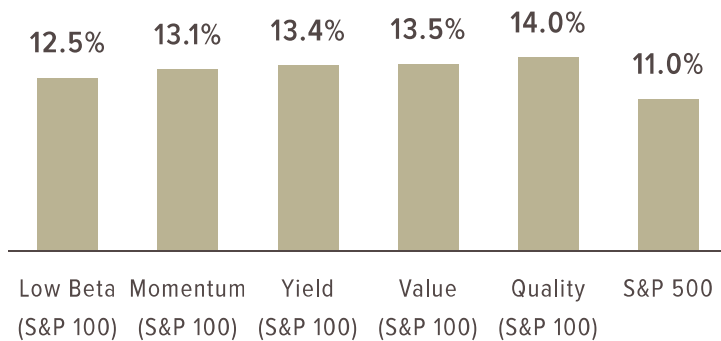
The Approach

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.

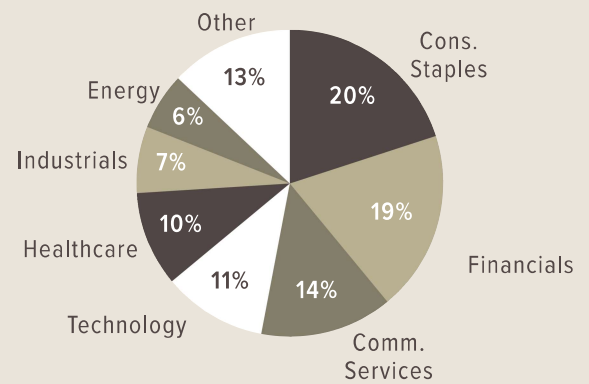
Annual Return - Dec. 1990 - Sept. 2024



Key Facts

Strategy Assets — \$92 Million
 Holdings — 52
 *Beta (Ex-Ante) — 0.76
 Active Share — 70%
 Min Portfolio Size — \$50,000

Sector Weightings



Top 5 Holdings (% weight)

AT&T	4.1%
Verizon	4.0%
Nvidia	2.9%
Meta Platforms	2.8%
American Express	2.7%

*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 Sep. 2024; Bloomberg as of Sep. 2024

E / contact@6meridian.com • P / 316.776.4601 / 855.334.2110 • F / 316.776.4620

WWW.6MERIDIAN.COM • 8301 E. 21st Street N. Ste. 150, Wichita, KS 67206

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