Four Points Advisors

Fact Sheet | March 31, 2026

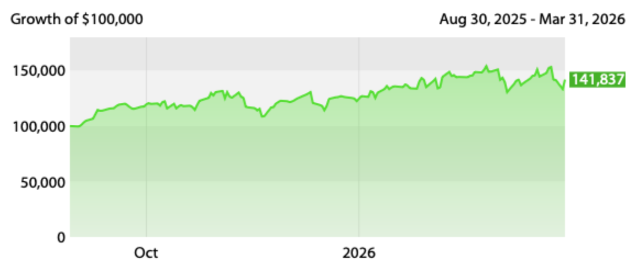
Tech Momentum 20

Strategy

Tech Momentum 20 invests in technology names with the objective of outperforming its benchmark over time on a risk-adjusted basis. The portfolio is intentionally constructed to differ from the benchmark, seeking to capture alpha through concentrated exposure to a select group of high-momentum large-cap stocks, with a systematic reallocation to defensive positions during adverse market conditions.

Strategy Information

Launch Date	08/30/2025
Number of Holdings	20
Benchmark	S&P500 (Total Return)
Structure	Separately Managed Account
Highlights	• Concentrated discipline: Selected from a filtered universe of large cap equities • Signal-driven protection: Shifts to a defensive posture when conditions weaken
Portfolio Manager	Four Points Quantitative Team



Historical performance shown since launch, net-of-fees and with dividends and capital gains reinvested.[2] There is no direct correlation between this illustration and the anticipated performance of the Strategy. **Past performance is not a guarantee of future results.**

Period Returns[1]

	QTR	YTD	1 YR	3 YR	5 YR	10 YR	Since Inception
Net of Fees[2]	15.9	15.9	-	-	-	-	41.84
Gross of Fees	16.41	16.41	-	-	-	-	43.31
S&P500 TR[3]	-4.33	-4.33	-	-	-	-	1.79

[1] Returns are average annualized total returns except for periods less than one year which are cumulative.
[2] Net-of-fees returns are calculated by deducting the maximum managed account fee of 1.75% and does not reflect the deduction of other fees/charges borne by investors and assumes reinvestment of interest or dividends.
[3] Benchmark

The value of the portfolio will fluctuate based on the value of the underlying securities.
Individual returns may vary based on factors such as the account type, market value, cash flows and fees. Current performance is preliminary and may be higher or lower than the performance shown.

Tech Momentum 20 SMA

Risk/Return Metrics[1]

	Portfolio	Benchmark
Upside Capture	2.93	1.00
Downside Capture	0.82	1.00
Standard Deviation	36.9%	10.6%
Sharpe Ratio	1.75	-0.41

[1] Risk/Returns Metrics since launch date are calculated on a gross-of-fee basis and do not reflect the deduction of fees and expenses. Please see the Period Returns for gross and net performance.

IMPORTANT INFORMATION

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Investment Risks

Investing involves risk, including the risk of loss. The strategies referenced herein may underperform during periods of elevated market volatility. The Firm's investment process includes a focus on trend and volatility measures but does not eliminate downside exposure. During adverse conditions, allocations may shift to assets with historically lower correlation to equities; however, these allocations **do not guarantee protection** against loss.

Past performance is not indicative of future results.

Investment in the strategy will involve a high degree of risk, including but not limited to the risks that the sectors perform unfavorably, and market return expectations change. Opportunities to dispose of assets may be limited, so investors may not have access to capital when it is needed. An investor's investment in the strategy should be limited to the risk capital portion of its investment portfolio. Recipients should make their own investigation of the investment strategy including the merits and risks involved and the legality and tax consequences of a potential investment therein. Each recipient should make its own inquiries and consult its advisors as to the investment strategy and as to legal, tax and related matters concerning a potential investment therein. None of Four Points, or any of their respective affiliates has or will provide any legal or tax advice to investors in the investment strategy and the information contained herein should not be construed as such. The information contained herein should not be construed as investment advice.

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Past performance is not indicative of future performance. Actual performance will vary, perhaps materially, from the performance set forth herein. Performance is presented net of advisory fees, using 1.75% annual advisory fee in this example Four Points Advisors advisory fees are negotiable. Other fees borne by investors and not included in this report are: commissions, custodial charges and sales loads. If applicable, these fees will have a compounding effect on performance that can be material.

Stock and ETF prices fluctuate, sometimes rapidly and dramatically, due to factors affecting individual companies, particular industries or sectors, or general market conditions. During times of extreme market volatility, the Index will not be able to eliminate market losses or capture all market gains. There is no assurance that investment products based on an index will accurately track index performance or provide positive investment returns. There is no guarantee that any strategies utilizing an Index will be effective or successful. Multi-asset indices and diversification do not promise any level of performance, success, or guarantee against loss of principal.

Definitions:

Risk (Standard Deviation): a measure of dispersion of returns around their historical average. The higher the standard deviation, the more widely the investment's returns vary over time.

Sharpe ratio: compares the investment return against the risk-free return (US Treasury Bill), after adjusting for risk. The greater the Sharpe ratio, the better its risk-adjusted performance.

Up/Down capture ratio: shows what portion of a market performance was captured by an investment in up and down markets.