ALPHA SUMMIT

Dynamic Buyback Achievers

Alpha Summit Investments

Exclusive Strategy for Shareholder Yield & Growth

The Dynamic Buyback Achievers strategy invests in leading U.S. companies with a proven track record of rewarding shareholders through substantial share repurchases. It targets 16 corporations from the Nasdaq U.S. Buyback Achievers Index that have reduced their shares outstanding by at least 5% over the prior 12 months. This approach combines the potential for capital appreciation from well-managed companies with a disciplined monthly covered call overlay to enhance portfolio income.

Buyback Leaders

Concentrated Portfolio

Growth & Value Blend

Key Features: *Dynamic Buyback Achievers*

Buyback Leaders | Share Reduction Focus

Focuses on companies actively reducing outstanding shares, signaling strong balance sheets and management confidence. Targets firms with net share reductions of at least 5% over the prior 12 months.

Concentrated Portfolio | High Conviction Positions

Invests in 16 high-conviction positions from the Nasdaq U.S. Buyback Achievers Index. Concentrated approach allows for thorough analysis and meaningful exposure to companies actively returning capital to shareholders.

Tactical Rebalancing | Quarterly Reassessment

Quarterly reassessment of holdings to maintain optimal positioning. Adapts to changing market conditions while maintaining focus on companies with ongoing buyback activity and strong fundamentals.

Income Enhancement | Monthly Cash Flow

Generates additional monthly cash flow by selling out-of-the-money covered calls. Enhances total return potential while providing income generation and modest downside protection.

Growth & Value Blend | Dual Benefit Approach

Targets both capital gains and shareholder yield benefits from buyback activity. Combines growth potential from share repurchase programs with value characteristics of well-managed companies.

How it *Works*

Screens the Nasdaq U.S. Buyback Achievers Index for companies with a net share reduction of 5% or more in the last 12 months. Selects 16 high-potential stocks balancing growth, value, and buyback activity. Rebalances quarterly to respond to market and company-specific developments. Executes monthly covered calls to generate income.

Structural Notes:

- [x] 16-stock concentrated portfolio from Nasdaq U.S. Buyback Achievers Index
- [x] Minimum 5% net share reduction requirement over prior 12 months
- [x] Quarterly rebalancing based on buyback activity, fundamentals, and market trends
- [x] Monthly covered call implementation to generate income
- [x] Focus on companies demonstrating shareholder-friendly capital allocation
- [x] Minimum account size: $500,000 for inclusion in the composite

Scenario-based *Outcomes*

Market Condition	Strategy Outcome
Strong Bull Market	Captures equity gains from buyback leaders; covered calls may modestly cap upside
Flat Market	Generates income through call premiums, leveraging stable price ranges
Moderate Decline	Income from calls helps offset partial losses
Sharp Decline	Portfolio value declines in line with market; buyback activity and income can provide a cushion

Frequently Asked *Questions*

Q: How do buybacks enhance returns?

Reducing shares outstanding can increase earnings per share and support stock price appreciation by concentrating ownership among remaining shareholders and signaling management confidence.

Q: How does the income component work?

Through monthly out-of-the-money covered call writing, which generates premiums while allowing participation in moderate upside appreciation.

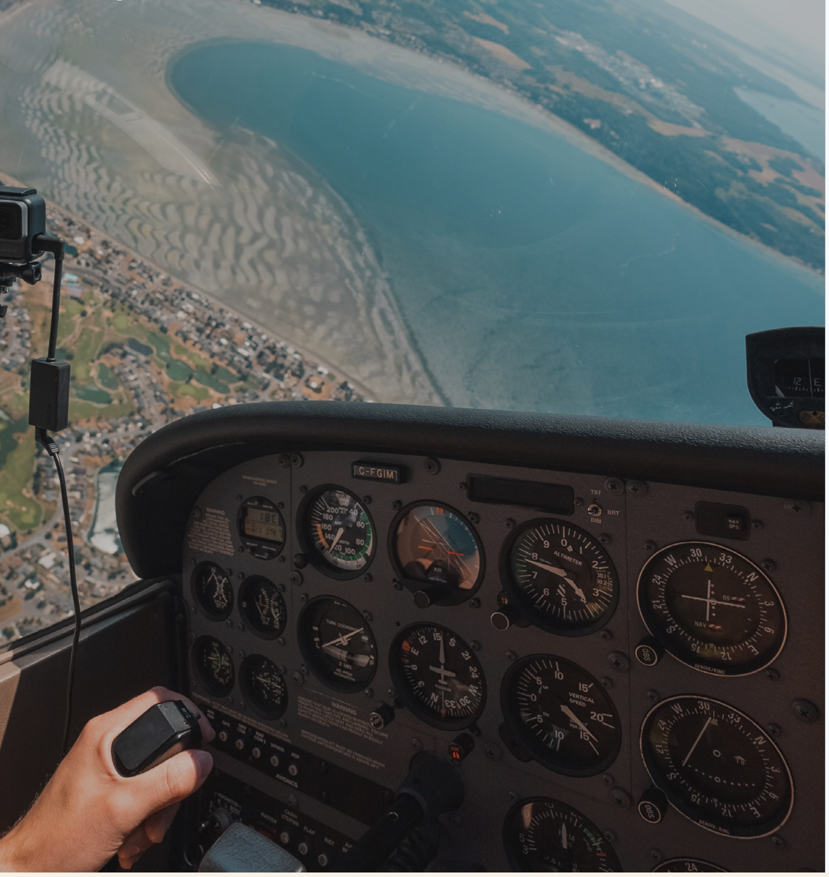
Q: How often is the portfolio reviewed?

Quarterly, with tactical changes based on fundamentals, buyback activity, and market trends to ensure continued alignment with strategy objectives.

Q: What type of investor is this for?

Those seeking a combination of equity growth potential, income generation, and a focus on companies returning capital to shareholders through disciplined buyback programs.

We serve a select group of institutional clients, including Registered Investment Advisors (RIAs), family offices, and endowments who seek both stability, innovation, and efficiency in their portfolios.



Disclosures: