ALPHA SUMMIT

Dynamic Disruptors 20

Alpha Summit Investments

Exclusive Strategy for Innovation & High Growth

The Dynamic Disruptors 20 strategy focuses on global leaders of innovation while generating supplemental income. It invests in companies that are reshaping their industries through groundbreaking technologies, products, and business models, while also employing a tactical covered call program to enhance total returns. Selected from the Nasdaq 100, these firms are at the forefront of Information Technology, Communication Services, Consumer Discretionary, and Health Care. The portfolio holds 20 stocks and is rebalanced quarterly to maintain exposure to the most promising high-growth disruptors in the market.

Innovation Leaders

Sector Focus

Global Reach

Key Features: *Dynamic Disruptors 20*

Innovation Leaders | Transformational Change

Invests in companies driving transformational change in their industries through groundbreaking technologies, products, and business models. Focuses on market leaders pioneering new paradigms and disrupting traditional business practices.

Sector Focus | High-Growth Industries

Targets high-growth sectors: Information Technology, Communications, Consumer Discretionary, and Health Care. Concentrates on industries experiencing rapid innovation cycles and structural transformation driven by technological advancement.

Income Generation | Covered Call Overlay

Active out-of-the-money covered call writing program implemented monthly. Generates supplemental income while maintaining upside exposure and growth potential.

Concentrated Portfolio | High Conviction Positions

Holds 20 high-conviction positions selected for growth potential and market leadership. Concentrated approach allows for thorough analysis and meaningful exposure to companies with the greatest disruptive potential.

Tactical Rebalancing | Dynamic Positioning

Quarterly reviews to ensure continued alignment with disruptive growth trends. Adapts to changing market conditions, emerging technologies, and evolving innovation landscapes to maintain optimal positioning.

Global Reach | International Innovation

Includes leading innovators from around the world, primarily within the Nasdaq 100. Provides exposure to global innovation leaders regardless of geographic origin, capturing the best disruptive opportunities worldwide.

How it *Works*

Screens the Nasdaq 100 for companies with leadership positions in disruptive sectors. Selects 20 stocks based on growth metrics, innovation leadership, and industry impact. Maintains sector diversification across technology-driven industries. Rebalances quarterly to adapt to changing market conditions and emerging opportunities in the innovation landscape.

Structural Notes:

- ☑ 20-stock concentrated portfolio from Nasdaq 100 universe
- ☑ Focus on Information Technology, Communication Services, Consumer Discretionary, and Health Care
- ☑ Quarterly rebalancing based on innovation leadership and growth metrics
- ☑ Monthly covered call implementation
- ☑ Global reach with emphasis on transformational technology leaders
- ☑ Minimum account size: $25,000 for inclusion in the composite

Scenario-based *Outcomes*

Market Condition	Strategy Response
Strong Growth Rally	Participates in upside, covered calls may limit some gains
Flat/Modest Growth	Enhanced returns from covered call income
Market Volatility	Covered calls provide income buffer, tactical rebalancing
Growth Rotation	Quarterly review allows adaptation to new themes

Frequently Asked *Questions*

Q: What types of companies are included?

Global innovators from the Nasdaq 100 in technology, communications, consumer discretionary, and health care sectors that are driving transformational change in their industries.

Q: Is this a suitable core equity holding?

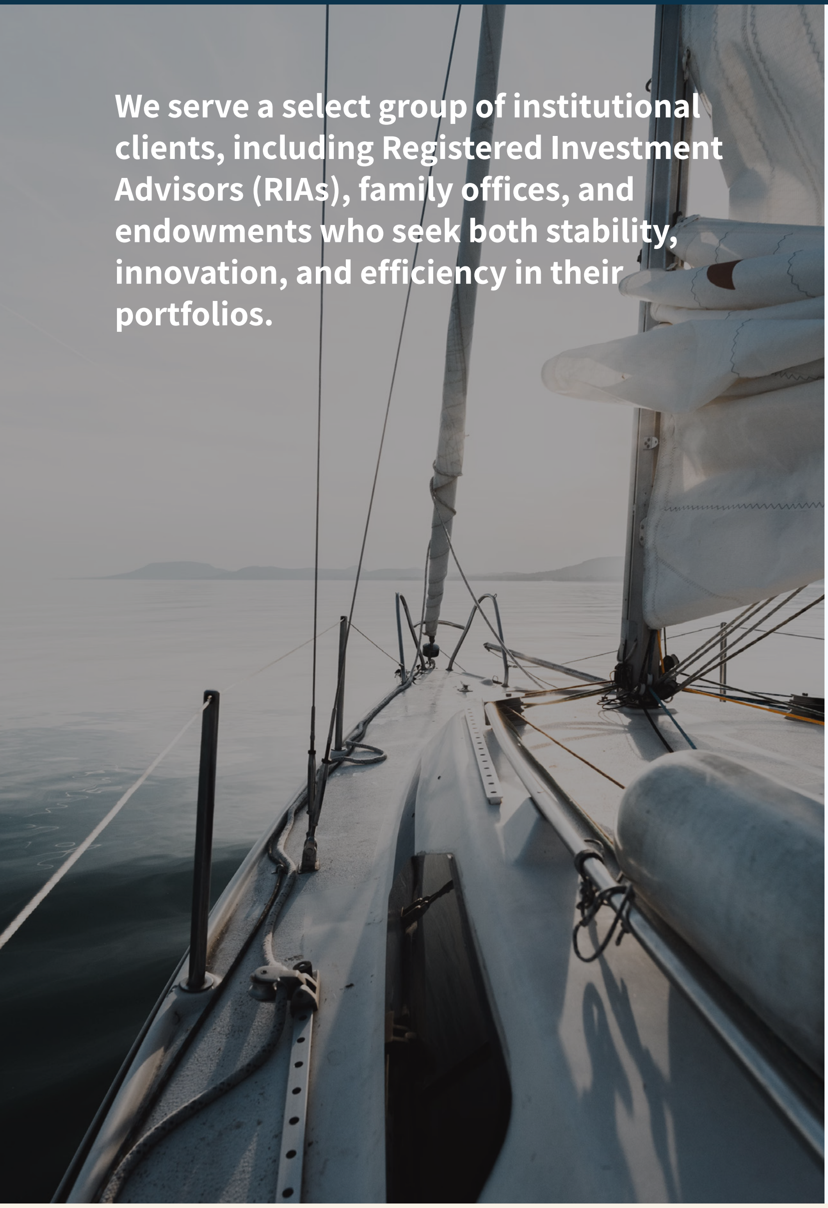
It is intended as a satellite growth allocation due to its concentration and higher volatility profile. Best suited for investors with long-term growth objectives and higher risk tolerance.

Q: How often is the portfolio updated?

Quarterly, with adjustments to maintain exposure to the most promising disruptors and adapt to emerging innovation trends and market opportunities.

Q: What is the minimum account size?

$25,000 for inclusion in the composite, allowing access to this concentrated innova tion-focused strategy within a diversified portfolio framework.



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