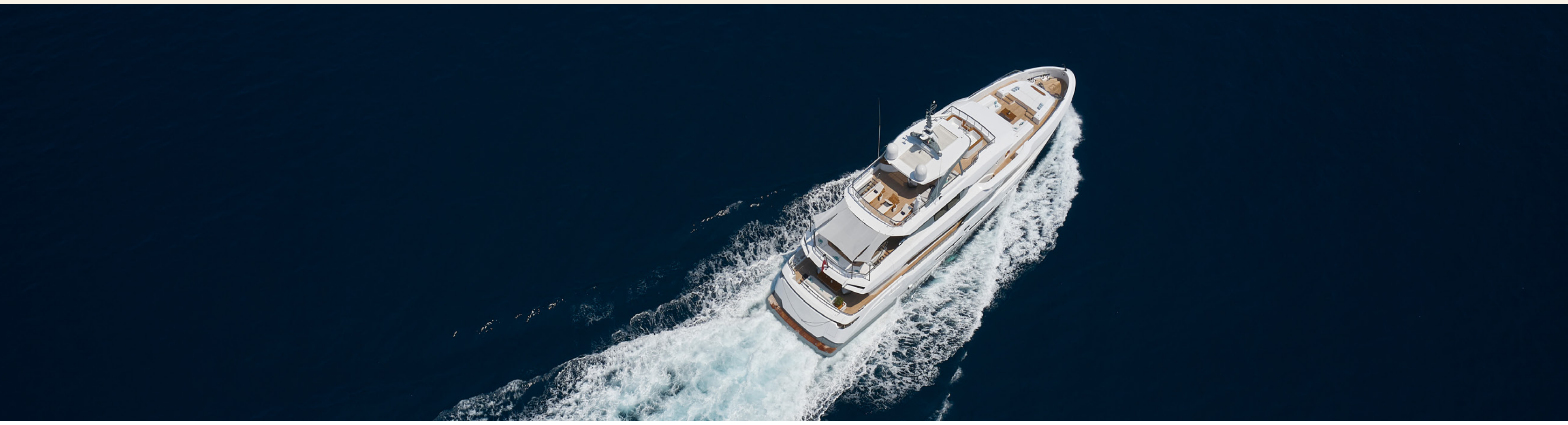
ALPHA SUMMIT



Dynamic Alpha Growth

Alpha Summit Investments

Exclusive Growth Strategy with Income Enhancement

The Dynamic Alpha Growth strategy is designed to help investors capture concentrated growth opportunities while generating supplemental income. This focused growth strategy targets high-momentum companies from the Nasdaq 100 index, combining active security selection with a tactical covered call program to deliver enhanced total returns. For investors seeking growth exposure with an income component, the strategy offers an innovative approach to capturing technology and growth themes while preserving flexibility and generating current cash flow.

Growth Focused

Income Generation

Concentrated Portfolio

Key Features: *Dynamic Alpha Growth*

Growth Focused | Nasdaq 100 Universe

Targets high-momentum growth companies from the Nasdaq 100 index. Focuses on companies with strong momentum characteristics and attractive industry-level price-to-earnings ratios.

Concentrated Portfolio | Tactical Selection

Concentrated exposure to 16 carefully selected Nasdaq 100 stocks. Allows for deeper research and conviction in each position while maintaining focused diversification within growth sectors.

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.

Quarterly Rebalancing | Dynamic Management

Employs tactical quarterly reassessment of holdings to adapt to evolving market conditions. Dynamic position sizing based upon conviction levels and risk-adjusted return potential.

Risk Management | Disciplined Process

Uses a disciplined, rules-based process grounded in market data and valuation metrics. Tactical covered call writing provides dual benefits of income generation and downside protection during volatility.

Holistic Integration | Wealth Management Platform

Backed by SteelPeak's comprehensive wealth management platform, ensuring the strategy fits into each client's overall financial plan rather than operating in isolation.

How it *Works*

Each quarter, the strategy conducts a comprehensive review of Nasdaq 100 companies, selecting 16 stocks based on momentum characteristics and valuation metrics. Monthly, the strategy implements an out-of-the-money covered call program on the underlying positions to generate additional income while preserving upside potential.

Structural Notes:

- [x] 16-stock concentrated portfolio from Nasdaq 100 universe
- [x] Quarterly tactical rebalancing based on momentum and valuation
- [x] Monthly covered call implementation
- [x] Equal-weight position sizing applied consistently across holdings
- [x] Integration with broader wealth management objectives
- [x] Minimum account size: $500,000 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

Important *Considerations*

Suitability:
This strategy is designed for investors seeking growth exposure with an income component who can tolerate higher volatility associated with concentrated equity positions. The strategy may experience periods of underperformance during rapid market rallies due to covered call positions limiting upside participation.

Risk Profile:
Concentrated portfolio risk, covered call limitation on upside, technology sector concentration, and market volatility impact. The strategy requires active management and may not be suitable for all investors.

Investment Horizon:
Best suited for investors with medium to long-term investment horizons who can benefit from both capital appreciation potential and regular income generation.

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: