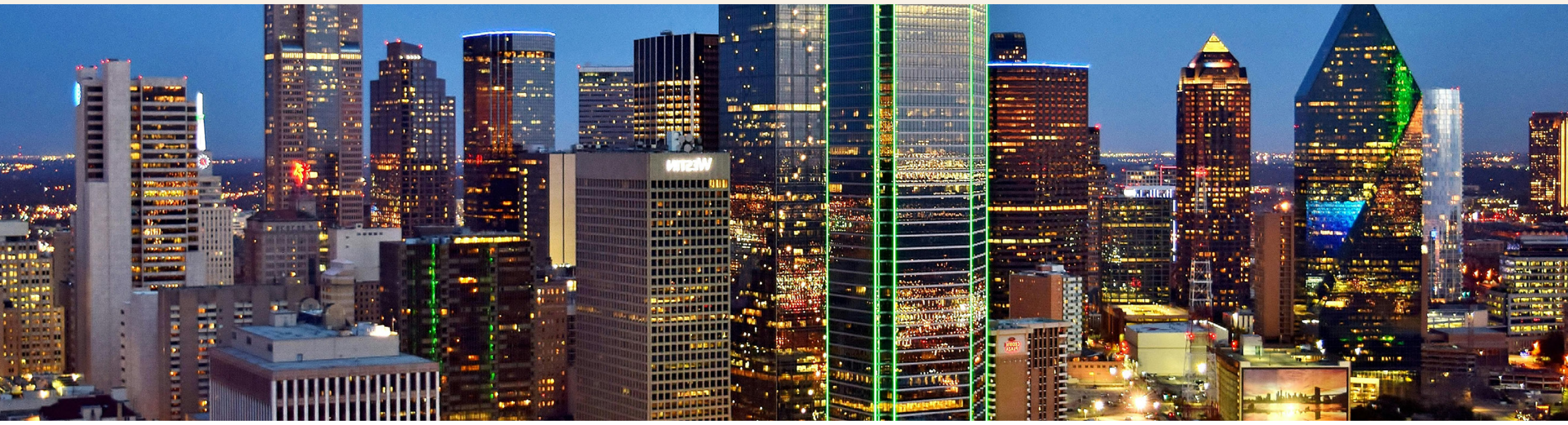
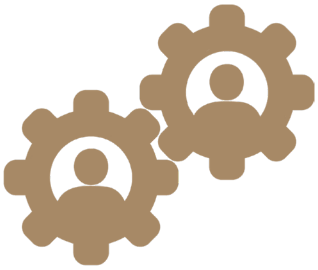
ALPHA SUMMIT



Dynamic Alpha Value

Alpha Summit Investments



Exclusive Strategy for Value with Income

Dynamic Alpha Value is built for investors seeking dependable dividend income and disciplined equity exposure to industry-leading companies. This concentrated strategy invests in 16 blue-chip names from the Dow Jones Industrial Average, selected for their consistent dividend yield, high momentum, and attractive industry-level valuations. By integrating a monthly covered call overlay, it aims to provide reliable cash flow while preserving long-term upside.

Blue-Chip Focus

Dividend Consistency

Income Enhancement

Key Features: *Dynamic Alpha Value*

Blue-Chip Focus | Dow Jones Industrial Average

Invests in established leaders from the Dow Jones Industrial Average. Targets companies with proven track records, strong market positions, and institutional-quality fundamentals.

Dividend Consistency | Stable Income Streams

Targets companies with stable and attractive dividend yields. Focuses on businesses with a history of consistent dividend payments and sustainable payout ratios.

Momentum-Driven Selection | Relative Strength

Screens for stocks with strong relative strength within their sector. Combines value characteristics with momentum indicators to identify outperforming blue-chip opportunities.

Tactical Rebalancing | Quarterly Discipline

Quarterly adjustments to maintain optimal allocation and valuation discipline. Adapts to changing market conditions while maintaining focus on quality dividend-paying companies.

Income Enhancement | Monthly Covered Calls

Out-of-the-money covered calls written monthly to generate additional cash flow. Enhances dividend income while maintaining participation in equity upside potential.

How it *Works*

Selects 16 Dow Jones Industrial Average constituents based on dividend yield, momentum, and valuation metrics. Rebalances quarterly to adapt to changing market conditions. Sells out-of-the-money covered calls each month to generate premium income. Monitors holdings continuously to manage risk and capture opportunities.

Structural Notes:

- ☑ 16-stock concentrated portfolio from Dow Jones Industrial Average
- ☑ Quarterly tactical rebalancing based upon dividend yield, momentum, and valuation
- ☑ Monthly covered call implementation on individual holdings
- ☑ Continuous monitoring for risk management and opportunity capture
- ☑ Focus on capital preservation and income generation
- ☑ Minimum account size: $500,000 for inclusion in the composite

Scenario-based *Outcomes*

Market Condition	Strategy Outcome
Stable or Rising Market	Captures equity gains while generating income from covered calls
Flat Market	Maximizes income potential as premiums are collected
Moderate Decline	Income helps offset partial losses
Sharp Decline	Portfolio value declines in line with market; income partially cushions impact

Frequently Asked *Questions*

Q: What types of companies are included?

Large, established blue-chip companies from the Dow Jones Industrial Average with consistent dividend histories and strong market positions.

Q: How does the strategy generate income?

Through monthly out-of-the-money covered call writing on individual holdings, combined with the underlying dividend income from the blue-chip companies.

Q: How often is the portfolio reviewed?

Quarterly, with tactical changes as needed based on dividend sustainability, momentum, and valuation metrics.

Q: Is this strategy suitable for growth investors?

It's designed for income-oriented investors but can complement a growth portfolio as a lower-volatility equity sleeve focused on quality dividend-paying companies.

Disclosures:

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