Dynamic Global Equity

Alpha Summit Investments

Exclusive Strategy for Diversified Global Growth with Income

Dynamic Global Equity provides broad global equity exposure through a diversified mix of domestic large-cap, domestic small/mid-cap, international, and emerging market equities. Implemented via carefully selected exchange traded funds (ETFs). This strategy combines global diversification with an active monthly covered call overlay to generate income. Tactical quarterly rebalancing ensures the portfolio stays aligned with prevailing market opportunities and risk conditions.

Global Diversification

ETF Implementation

Balanced Growth & Income

Key Features: *Dynamic Global Equity*

Global Diversification | Worldwide Equity Exposure

Exposure across U.S. large-cap, U.S. small/mid-cap, developed international, and emerging market equities. Provides comprehensive global market coverage to capture growth opportunities across different regions, market capitalizations, and economic cycles.

ETF Implementation | Efficient Market Access

Uses liquid, cost-efficient ETFs to gain targeted market exposure. Leverages the benefits of diversified fund structures while maintaining liquidity and cost-effectiveness for tactical allocation adjustments and covered call implementation.

Tactical Rebalancing | Dynamic Allocation

Quarterly review and adjustments to maintain alignment with market dynamics. Adapts allocations based on changing market conditions, economic outlook, and relative valuations across global equity markets to optimize risk-adjusted returns.

Monthly Covered Call Overlay | Income Generation

Generates supplemental income while managing volatility through systematic covered call writing. Monthly implementation provides consistent income opportunities while maintaining exposure to underlying global equity appreciation potential.

Balanced Growth & Income | Dual Objectives

Combines global equity growth potential with cash flow generation. Balances long-term capital appreciation opportunities from diversified global markets with income generation through the covered call overlay strategy.

How it *Works*

Allocates across ETFs representing U.S. large-cap, U.S. small/mid-cap, developed international, and emerging markets. Rebalances quarterly based upon tactical asset allocation insights. Executes monthly out-of-the-money covered calls to generate income. Adjusts allocations to reflect changes in market conditions, economic outlook, and relative valuations across global markets.

Structural Notes:

- ☑ Diversified ETF portfolio across U.S. large-cap, small/mid-cap, international, and emerging markets
- ☑ Quarterly tactical rebalancing based upon market conditions and valuations
- ☑ Monthly out-of-the-money covered call implementation on ETF holdings
- ☑ Dynamic allocation adjustments reflecting economic outlook and market opportunities
- ☑ Minimum account size: $100,000 for inclusion in the composite

Scenario-based *Outcomes*

Market Condition	Strategy Outcome
Strong Bull Market	Participates in global equity gains; covered call may modestly cap upside
Flat Market	Income from covered calls enhances returns despite muted equity performance
Moderate Decline	Income helps cushion some losses across global allocations
Sharp Decline	Portfolio declines in line with global equity markets; income provides partial offset

Frequently Asked *Questions*

Q: Why use ETFs instead of direct securities?

ETFs can provide efficient, liquid, and diversified exposure to multiple markets and sectors while maintaining cost-effectiveness and facilitating tactical allocation changes and covered call implementation.

Q: How often is the portfolio rebalanced?

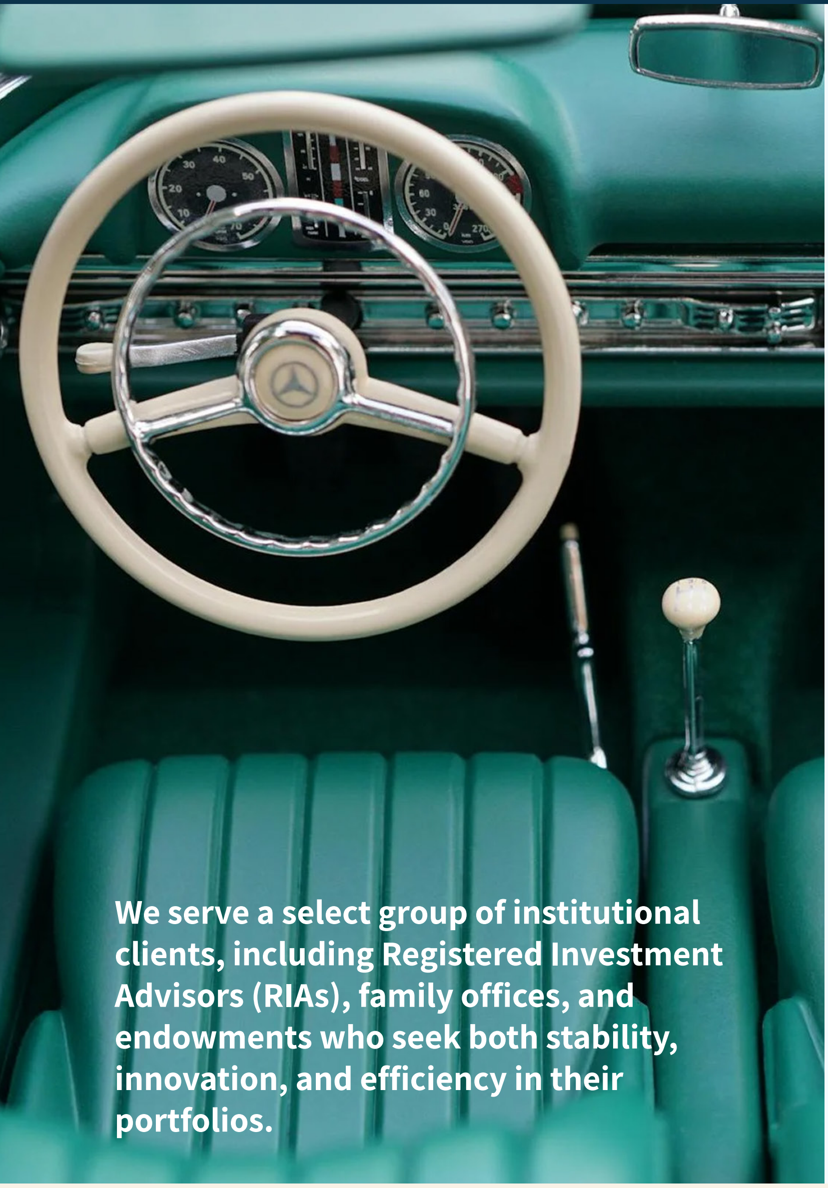
Quarterly, with tactical shifts as needed based on market outlook, economic conditions, and relative valuation opportunities across global equity markets.

Q: How does the strategy generate income?

Through monthly out-of-the-money covered call writing on ETF holdings, providing premium income while maintaining exposure to underlying equity appreciation.

Q: What is the minimum account size?

$100,000 for inclusion in the composite, providing access to diversified global equity exposure with income enhancement capabilities.



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