

Dynamic Alpha Growth

Alpha Summit Investments

Key Information

Inception Date:	1/1/2013
Number of Holdings:	16
Fund Size	\$110MM

Objective

The Dynamic Alpha Growth strategy helps investors capture concentrated growth opportunities while generating supplemental income. It targets high-momentum companies from the Nasdaq 100, combining active selection with a tactical covered call program to enhance total returns. For those seeking growth with income, it offers an innovative way to capture technology and growth themes while maintaining flexibility and generating cash flow.

Investment Committee



Chairman of Investment Committee:

Maz Esmailbeigi, AIF®, CFS®, CAS®
Founding Partner & CIO

Maz Esmailbeigi is Founding Partner and Chief Investment Officer at SteelPeak Wealth, bringing over 20 years of experience in portfolio management, SMA strategy design, and institutional asset allocation. His expertise spans behavioral finance, risk management, and multi-asset portfolio construction.

Top Holdings

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.

Stock	Name
AAPL	APPLE INC
AMAT	APPLIED MATERIALS INC
AMGN	AMGEN INC
APP	APPLOVIN CORPORATION
GOOGL	ALPHABET INC (A)
INTC	INTEL CORP
KLAC	KLA Corporation
LIN	LINDE PLC

Stock	Name
LRCX	LAM RESEARCH CORP
MU	MICRON TECH INC
PEP	PEPSICO INC
PLTR	PALANTIR TECHNOLOGIES INC
QCOM	QUALCOMM INC
SHOP	SHOPIFY INC
TMUS	T-MOBILE US INC
TSLA	TESLA INC

Performance

	1-Year	3-Year	5-Year	10-Year	Inception*
Composite	11.91%	25.74%	13.34%	12.61%	13.72%
Benchmark**	7.68%	16.80%	8.37%	8.79%	8.45%

Target Monthly Options Yield	
Gross Target Yield	0.50%
Advisory Fee	0.10%
Net Target Yield	0.40%

* Performance Inception Date: January 1, 2013

** Benchmark shown is the Cboe NASDAQ-100 BuyWrite Index (BXN)

Disclosures

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