

Dynamic Global Equity

Alpha Summit Investments

Key Information

Inception Date:	7/1/2013
Number of Holdings:	4
Fund Size	\$83.5MM

Objective

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.

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

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.

Stock	Name
SPY	SPDR S&P 500 ETF Trust
IWM	iShares Russell 2000 ETF
EFA	iShares MSCI EAFE ETF
EEM	iShares MSCI Emerging Markets ETF

Performance

	1-Year	3-Year	5-Year	10-Year	Inception*
Composite	14.33%	17.51%	11.24%	9.89%	8.73%
Benchmark**	8.90%	12.30%	8.45%	8.79%	4.83%

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

* Performance Inception Date: July 1, 2013

** Benchmark shown is a 50%/50% blend of the Cboe S&P 500 BuyWrite Index (BXM) and the Cboe MSCI EAFE BuyWrite Index (BXEA).

Disclosures

SteelPeak Wealth, LLC ("SteelPeak", d/b/a SteelPeak Sports and Alpha Summit Investments), an SEC-registered investment adviser located in California, along with SteelPeak Alternative Solutions, LLC (d/b/a Alpha Summit Funds), is providing this presentation for informational purposes only. There is no guarantee that any views, projections and/or opinions expressed herein will come to pass. Investing in the stock market involves the potential for gains and the risk of loss. Information presented herein is subject to change without notice and should not be relied upon as the sole basis for any investment decision. Past performance is not indicative of future results, and no representation is being made that any investment will or is likely to achieve profits or losses similar to those shown. All investments involve risk, including the potential loss of principal. SteelPeak may only transact business in those states in which it is notice filed or qualifies for an exemption or exclusion from notice filing requirements. This presentation should not be construed by any consumer and/or prospective client as SteelPeak's rendering of personalized investment advice. Nothing in this presentation constitutes a recommendation or solicitation to buy or sell any security or investment product. Any subsequent, direct communication by SteelPeak with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. SteelPeak and its affiliates may earn compensation from providing services or products to clients, including but not limited to management fees, performance-based fees, commissions, referral fees, and other forms of direct or indirect compensation, which may create potential conflicts of interest. These conflicts may include incentives to recommend certain products or services over others. Clients should carefully review SteelPeak's Form ADV Part 2A for a complete description of all fees, compensation arrangements, and conflicts of interest, before entering into any advisory relationship. SteelPeak is committed to maintaining transparency and acting in clients' best interests in accordance with its fiduciary duty under the Investment Advisers Act of 1940. However, prospective clients should be aware that no advisory relationship is created by receipt of this presentation, and SteelPeak owes no fiduciary duty to recipients until a formal written advisory agreement is executed by both parties. For information pertaining to the registration status of SteelPeak, please contact the United States Securities and Exchange Commission on their web site at www.adviserinfo.sec.gov. A copy of SteelPeak's current written disclosure brochure (Form ADV Part 2A) discussing SteelPeak's business operations, services, and fees is available from SteelPeak upon written request. Options involve risk and are not suitable for all investors. Before investing in options, please read Characteristics and Risks of Standardized Options published by The Options Clearing Corporation, available at www.theocc.com. Options strategies may result in significant losses and are intended for investors who understand the risks involved. Past performance is not indicative of future results.