

Digital Discovery

Active Investment, Innovative Technologies



The information herein is for informational purposes only and should not be used as the sole basis for making an investment decision. Investing involves risk including the potential loss of principal. Please consult your independent investment advisor before making any investment decisions.

Investment Philosophy

OBJECTIVE

Digital Innovation
Focused on Capital
Appreciation

MANDATE

Exposure to
Investments That
Benefit from
Technological
Revolution

EXECUTION

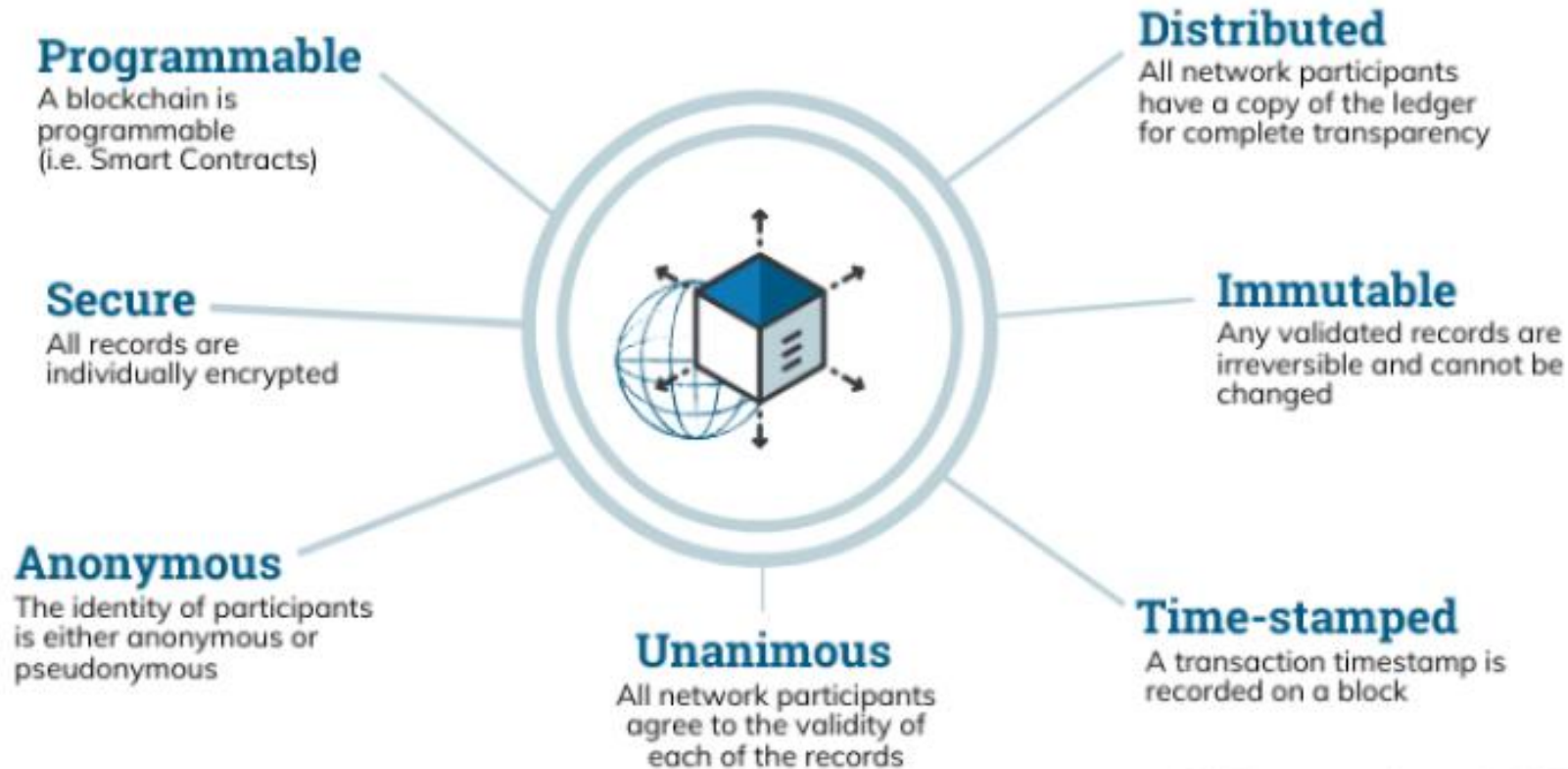
Actively Managed for
Opportunistic
Growth

Innovative Technologies



Blockchain

The Properties of Distributed Ledger Technology (DLT)



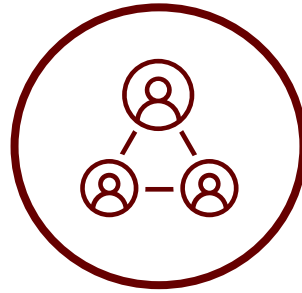
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What is Cryptocurrency?



Cryptocurrency is digital money created from code



The Cryptocurrency economy is monitored by a peer-to-peer internet protocol



Cryptocurrency is an encrypted string of data or a hash, encoded to signify one unit of currency

Examples of Cryptocurrencies

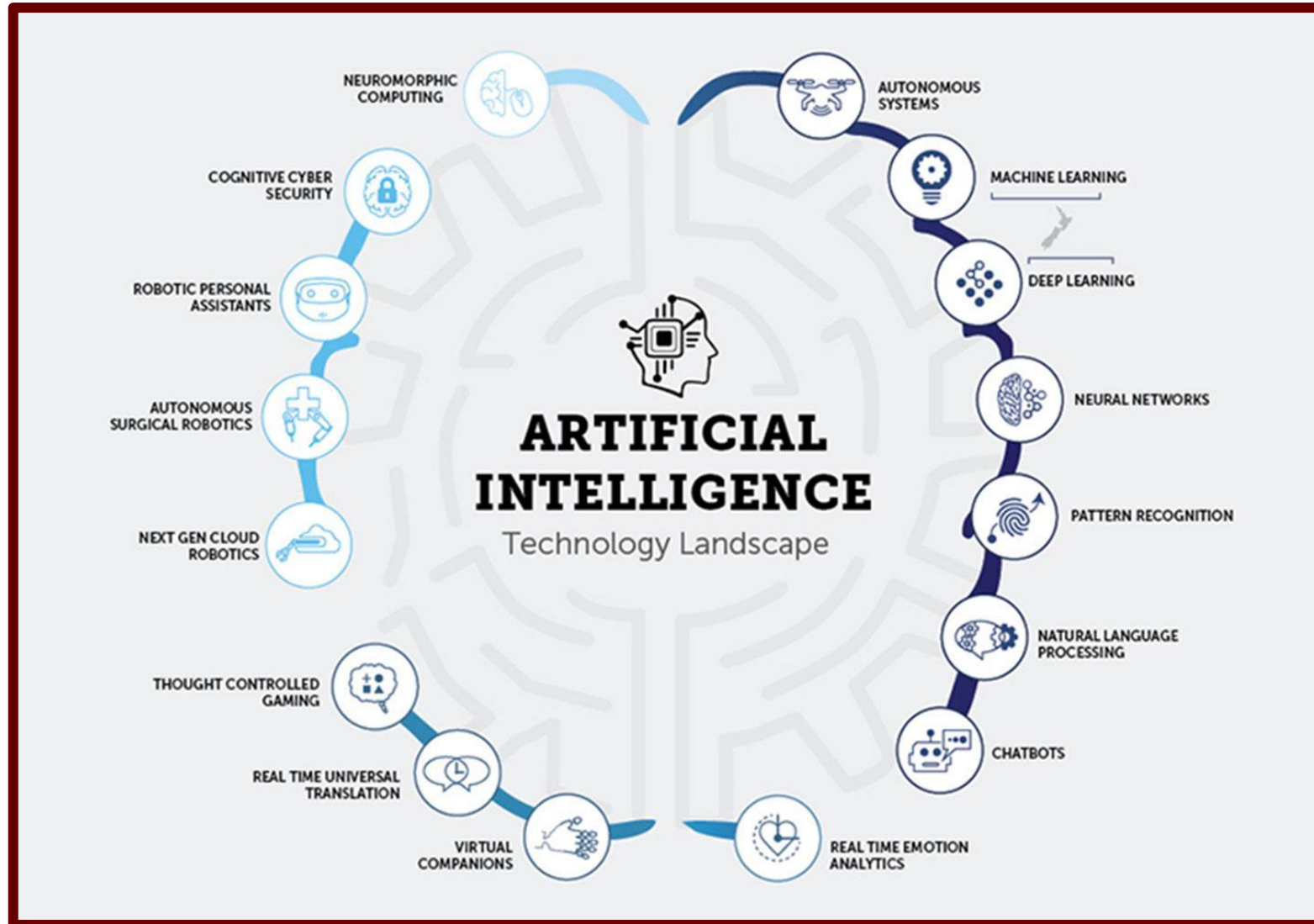


Bitcoin



Ethereum

Artificial Intelligence (AI)



Metaverse

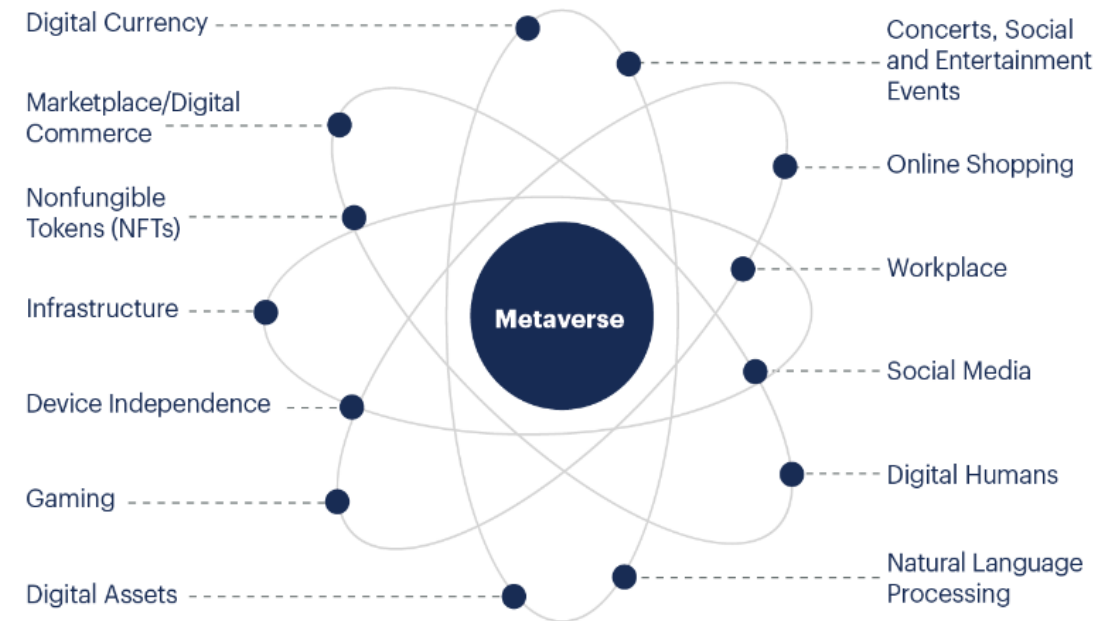
What is the metaverse?

- The next evolution of the internet (Web 3.0)
- Augmented and Virtual Reality
- Allows for interaction in 3-D format
- Supported by blockchain technology

What are the uses for the metaverse?

- Entertainment
- Social
- Business

Elements of a Metaverse



gartner.com

Source: Gartner

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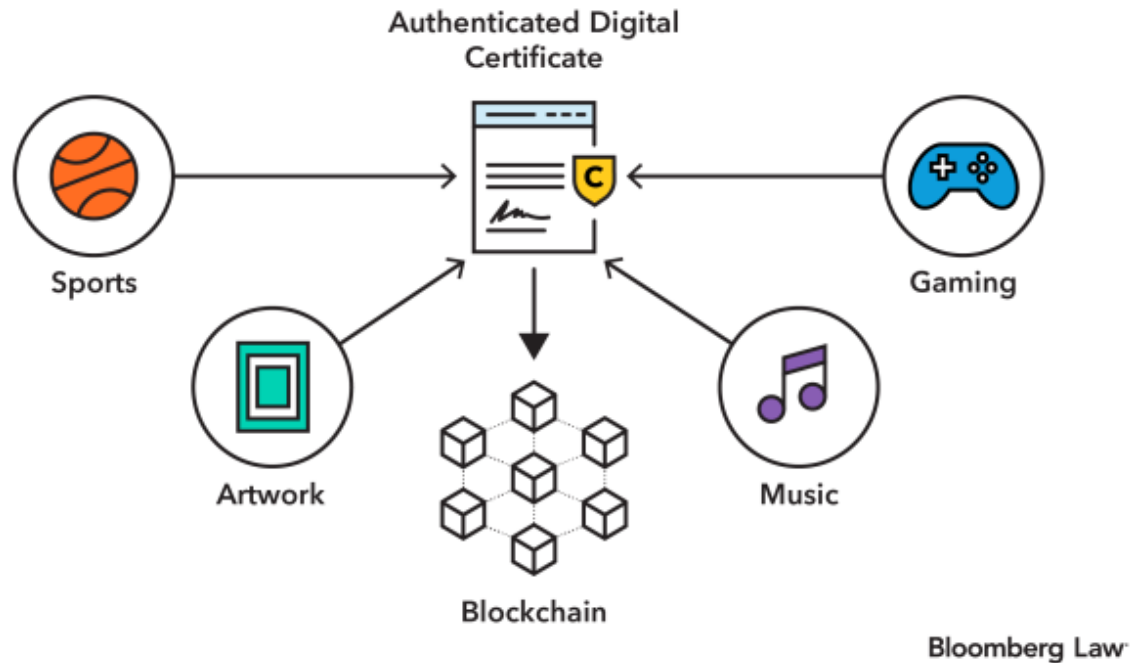
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Non-Fungible Tokens (NFT)

What are NFTs?

Non-fungible tokens are a unique unit of data that can be stored and tracked on a blockchain and bought or sold.



What are the uses of NFTs?

- Art:
 - Digital art
 - Tracking ownership
 - Recording prices
- Entertainment:
 - Ticketing transactions
- Personal Information:
 - Identification records
- Real Estate:
 - Mortgages / Titles

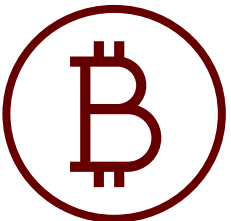
Diversification Through ETFs



Gradient Investments will use ETFs to gain exposure to the companies that benefit from digital technologies



ETFs provide industry exposure but in a diversified and liquid manner



Gradient Investments can own ETFs that are backed by a digital currency such as Bitcoin



Portfolio Allocation

Ticker	Provider	ETF/Stock	Category	Weight
CRPT	First Trust	Crypto Industry ETF	Crypto	15%
BLOK	Amplify	The Blockchain ETF	Blockchain	12%
IETC	iShares	US Tech ETF	US Tech	12%
AIS	VistaShares	AI Infrastructure	A.I.	10%
LOUP	Innovator Deepwater	Frontier Tech ETF	Tech	10%
CHAT	Roundhill	Artificial Intelligence ETF	A.I.	10%
QTUM	Defiance	Quantum Computing ETF	Quantum Computing	10%
HODL	VanEck	Cryptocurrency	Cryptocurrency	6%
NASA	TEMA	Space Innovators	Space	5%
MU		Micron Technology	A.I.	3%
SPCX		Space Exploration Technologies Corp	Space	3%
PLTR		Palantir Technologies	A.I.	3%
CASH				.5%
Total				100%

Risks:

- o Investing in digital technologies can be highly volatile
- o Standard deviations may be elevated relative to mature industries

As of: 8/30/26



Digital Discovery Portfolio

COMPOSITE PERFORMANCE THROUGH AUGUST 31, 2026

	YTD 2026	1 Year	3 Year	5 Year	10 Year	Annualized Return Since Inception*	Standard Deviation Since Inception*
Digital Discovery	13.62%	9.61%	41.41%	N/A	N/A	36.92%	41.89%

*Digital Discovery inception date is 10/1/22. Performance returns and standard deviation are composite of all accounts included in the respective portfolios. Returns are net of all transaction costs and net of Gradient Investment’s management fee but does not include the standard 1.00% advisor fee. These numbers are not meant to predict your individual results which could be better or worse. Investor’s net returns may vary based on advisory fee, account size, and householding. Investing involves risk including the possible loss of principal and past performance is no guarantee of future returns.



SUMMARY

DIGITAL DISCOVERY

Investing in innovative technologies

Long term capital appreciation

Sector investing involves outsized market fluctuations

Gradient risk profile: Aggressive Growth

\$500 Account Minimum

