GRADIENT INVESTMENTS, LLC
An SEC Registered Investment Advisor

ENERGY SECTOR FOCUS PORTFOLIO

Active Investment in a Dynamic Energy Landscape

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.

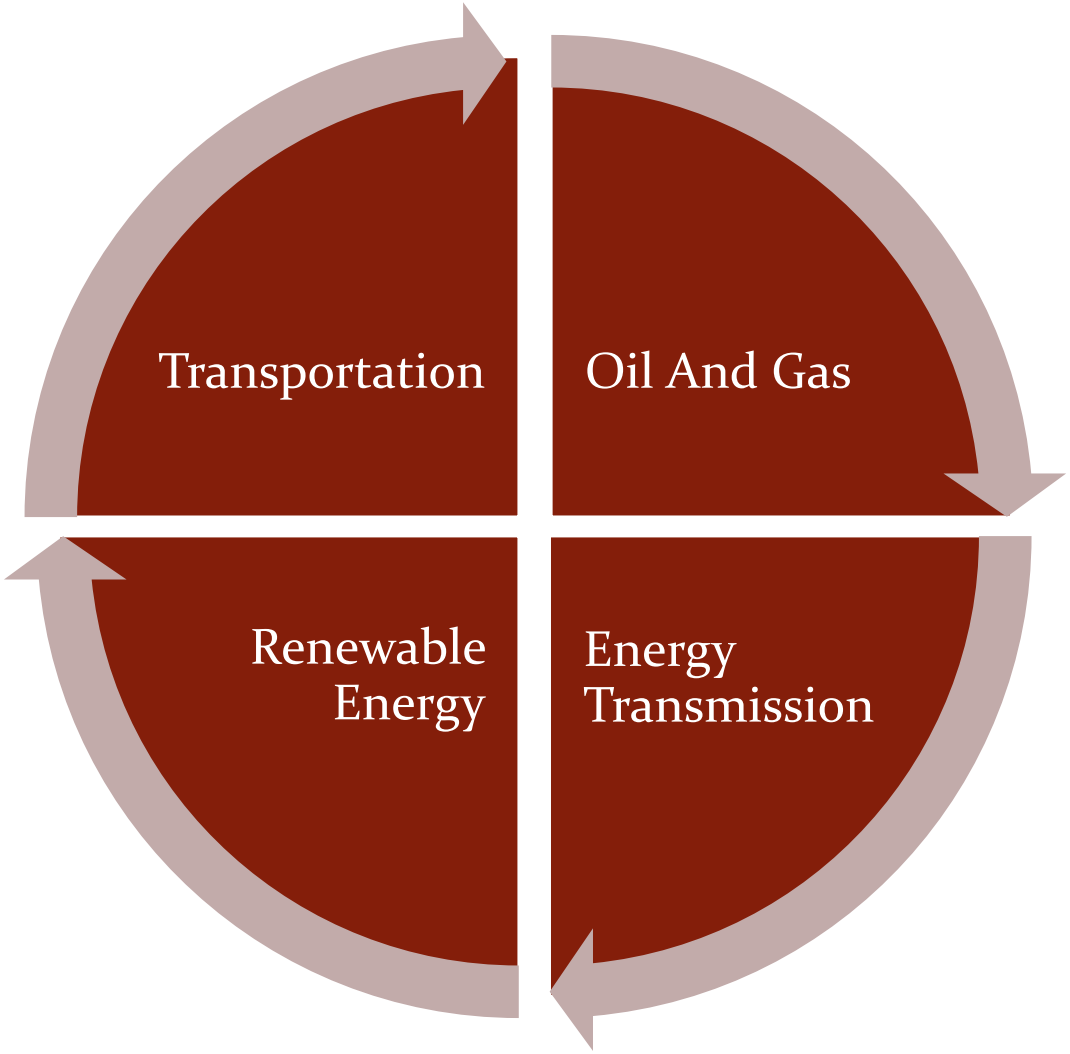
ENERGY SECTOR FOCUS

INVESTMENT PHILOSOPHY

OBJECTIVE	MANDATE	EXECUTION
Energy Focused Capital Appreciation	Exposure to Stocks That Benefit from Global Energy	Actively Managed for Opportunistic Growth

Global energy market

FOCUSED ON SPECIFIC SUB-SEGMENTS OF THE MARKETPLACE

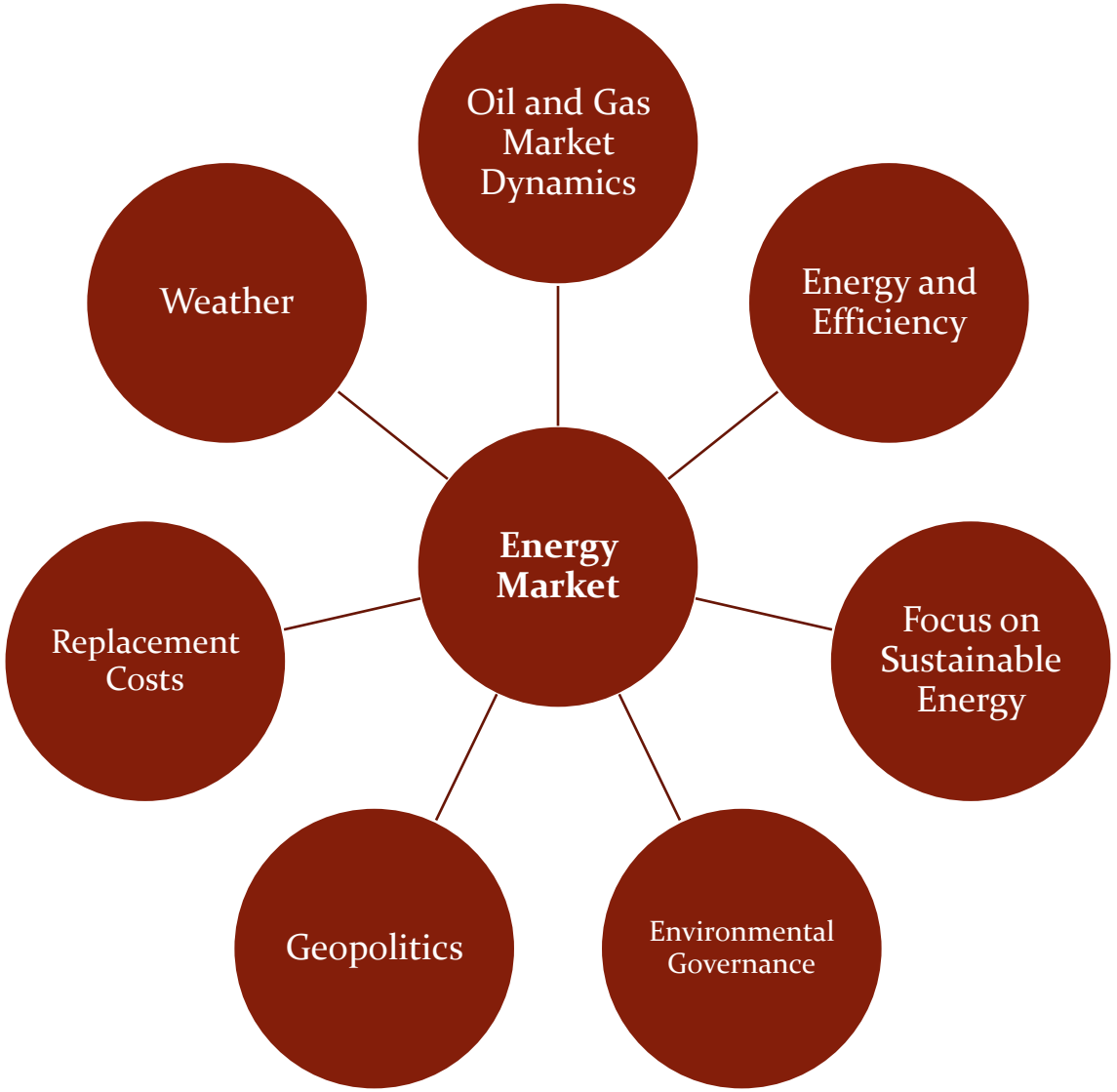


ENERGY SECTOR FOCUS

Energy Focused Companies

As of 8/31/2026

Drivers of Global Energy Transformation



ENERGY SECTOR FOCUS

Energy Sector Focus Performance

COMPOSITE PERFORMANCE THROUGH AUGUST 31, 2026

	YTD 2026	1 Year	3 Year	5 Year	10 Year	Annualized Return Since Inception*	Standard Deviation Since Inception*
Energy Sector	49.60%	50.95%	17.50%	25.10%	5.28%	7.24%	30.22%

Performance returns are composite of all accounts included in the Energy Sector Focus Portfolio. 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. *Inception date is 1/1/2016. 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. International investing is more volatile than the overall stock market and should ONLY be used for assets you wish to invest over the long-term at higher levels of risk.

SUMMARY

Energy Sector Portfolio

- Sector based investing in the energy markets
- Long term capital appreciation
- Diversification within energy complex
- Lower correlation to broad stock market returns
- Sector investing involves outsized market fluctuations
- Gradient risk profile: Aggressive Growth

Account Minimum: $10,000

Gradient Investments, LLC (GI) is a third-party money manager offering fee-only investment management through independent Registered Investment Advisory firms. For more information, please visit us at www.gradientinvestments.com or request a copy of Gradient Investments' ADV Part 2A. Please consult your independent investment advisor or GI regarding your specific goals and objectives before investing.

ENERGY SECTOR FOCUS