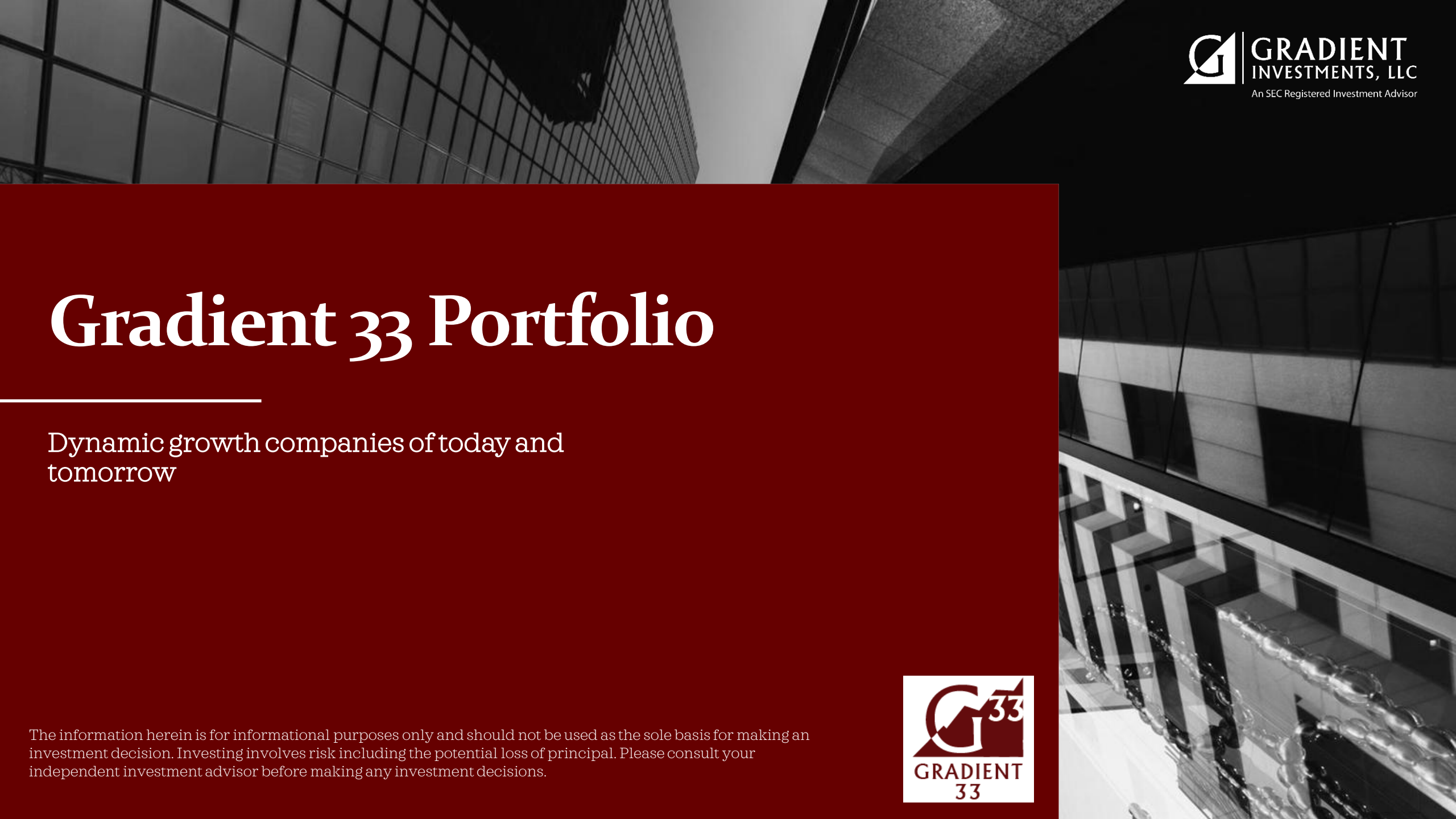


GRADIENT INVESTMENTS, LLC
An SEC Registered Investment Advisor

Gradient 33 Portfolio

Dynamic growth companies of today and tomorrow

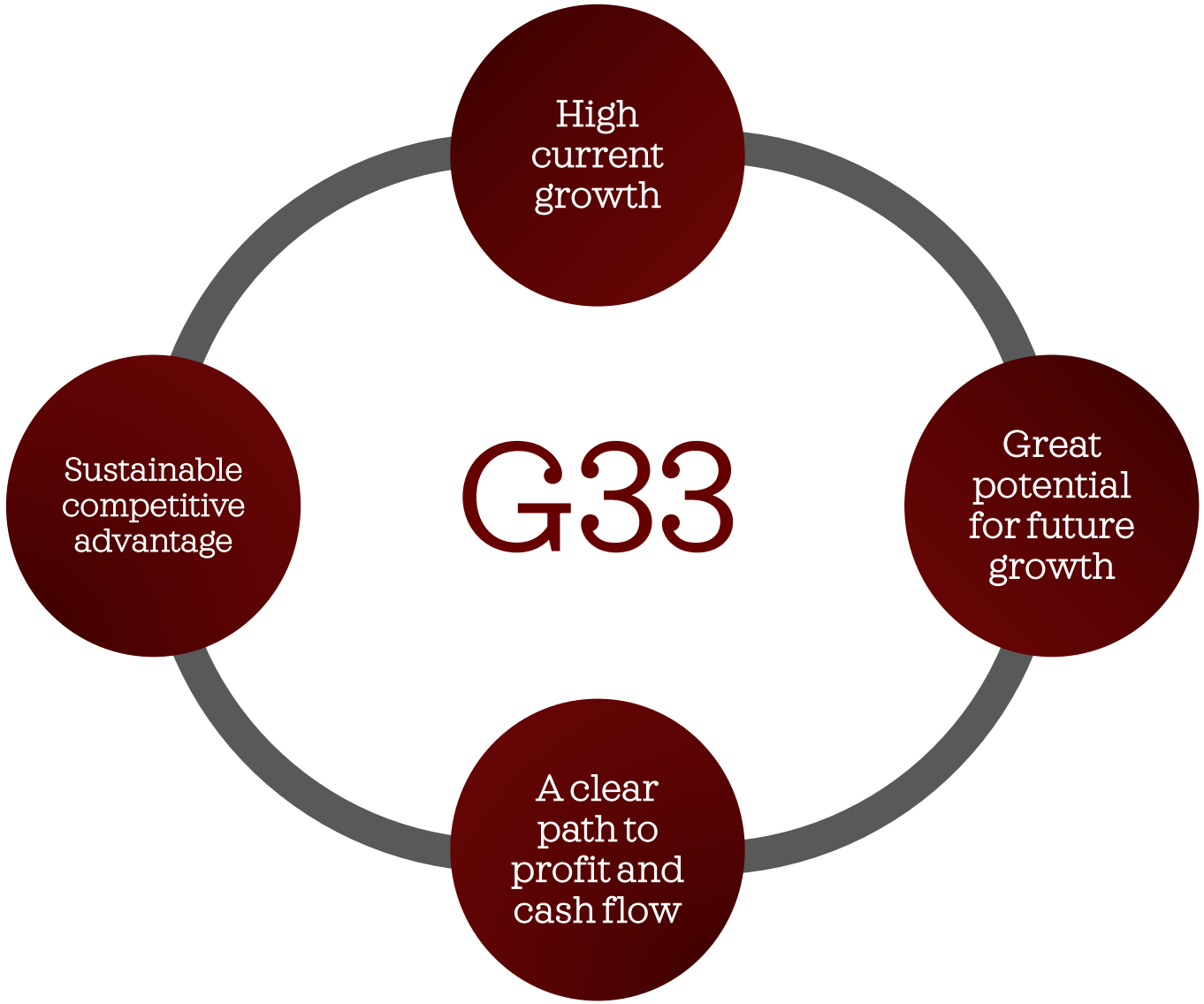
The information herein is for informational purposes only and should not be used as the sole basis for making an investment decision. Investing involves risk including the potential loss of principal. Please consult your independent investment advisor before making any investment decisions.

G33 GRADIENT 33

INVESTMENT PHILOSOPHY

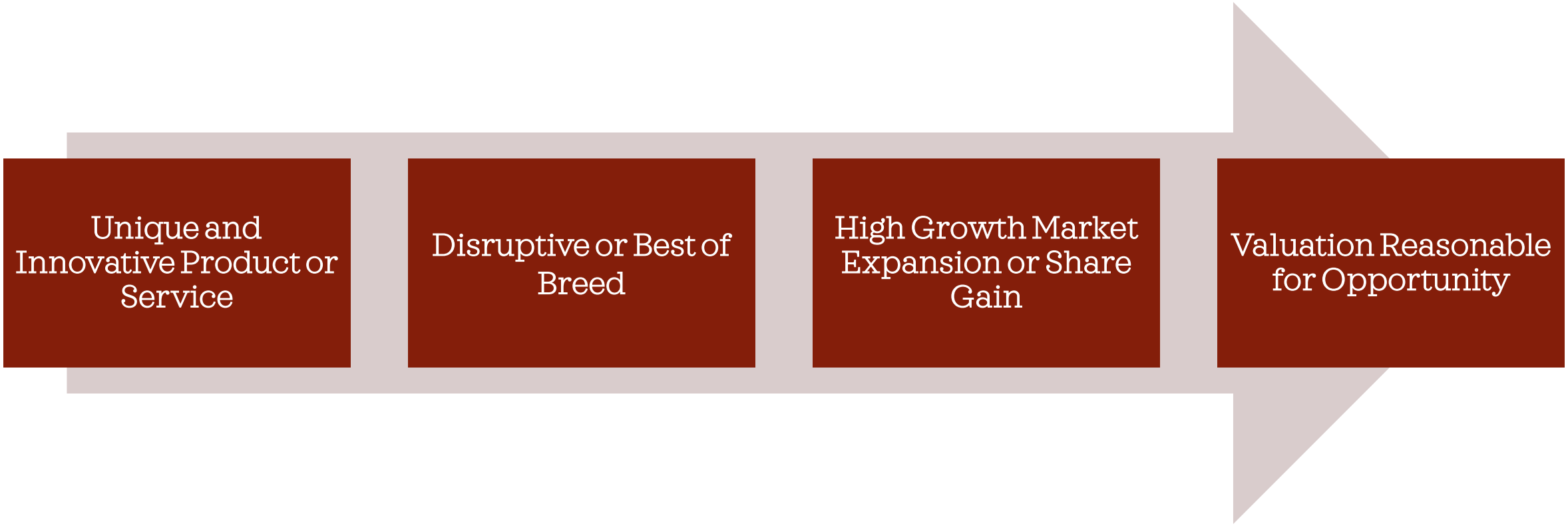
OBJECTIVE	MANDATE	EXECUTION
Long term capital appreciation	Stock allocation targeted toward high growth companies	Actively managed with a disciplined investment process

THE IDEAL GROWTH COMPANY



GRADIENT 33

G33 STOCK SELECTION PROCESS



GRADIENT 33

HIGH GROWTH COMPANIES

LARGE CAP

Google

Microsoft

NVIDIA

SMALL & MID CAP

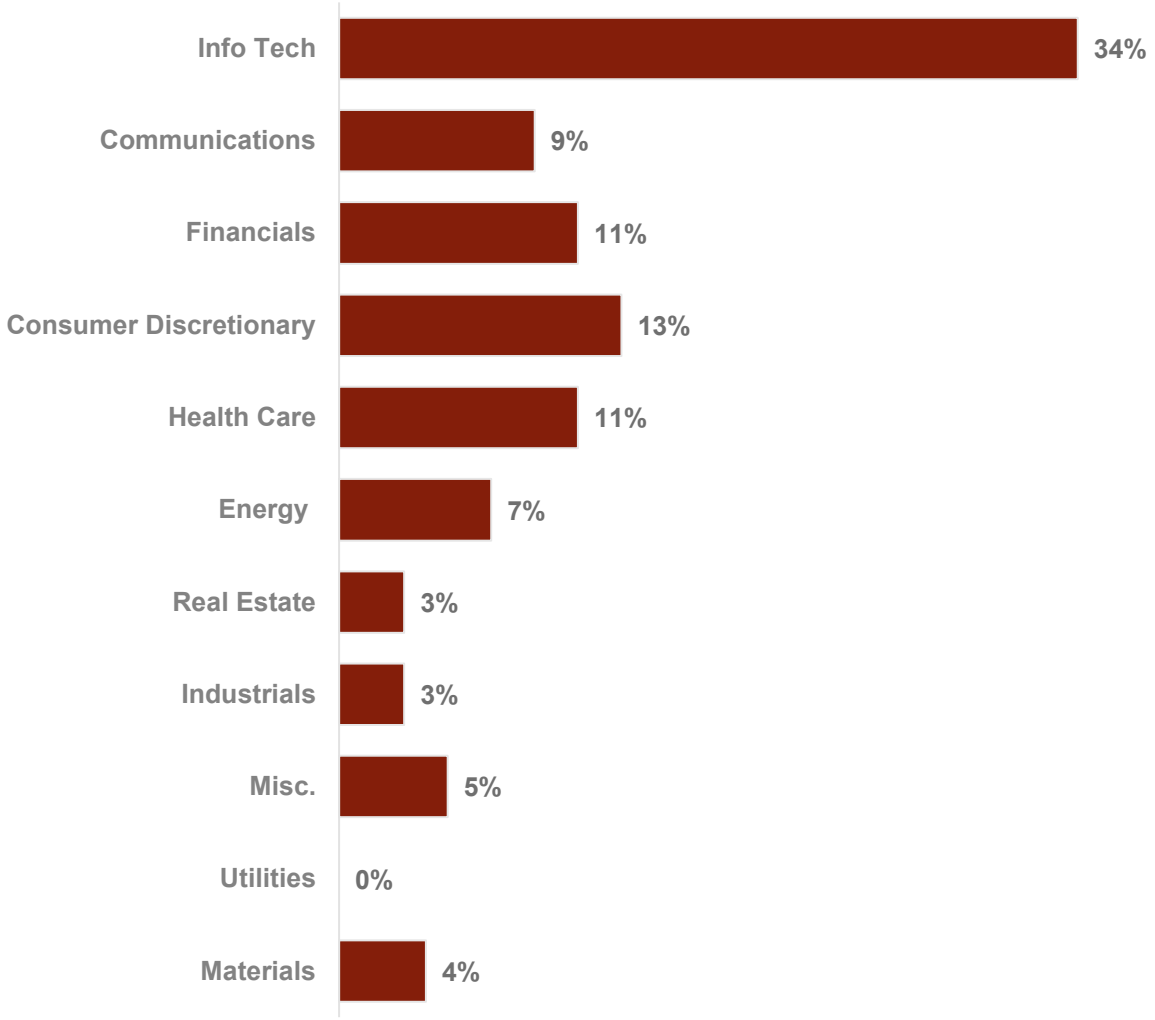
five BELOW

HealthEquity

SAIA

As of 8/31/2026

G33 PROFILE



6% Large Cap Value	18% Large Cap Core	24% Large Cap Growth
6% Mid Cap Value	15% Mid Cap Core	15% Mid Cap Growth
6% Small Cap Value	6% Small Cap Core	3% Small Cap Growth

Portfolio Allocation as of August 31, 2026

The G33 Model Portfolio: monthly sector diversification and equity investment style as classified by FactSet. Totals do not include cash.

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G33 GROWTH 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*
Gradient 33	14.28%	20.22%	16.27%	4.34%	11.72%	11.28%	17.96%

*Inception date is 1/1/2013. Performance returns and standard deviation numbers are composite of all accounts included in the Gradient 33. 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 household. Investing involves risk including the potential loss of principal and past performance is no guarantee of future returns.

SUMMARY

G33 PORTFOLIO

- **Long term growth primary through stock price appreciation**

- **The G33 is an ideal vehicle for:**
  - Investing in dynamic growth companies
  - Small, mid, and large cap companies

- **Gradient "E" Risk Profile (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.

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