

MULTI-STRATEGY PORTFOLIO SERIES

ACTIVE & PASSIVE - A COMPREHENSIVE SOLUTION

As of December 31, 2025 | Updated Annually

By blending both active and passive investment styles, the Kingsview Investment Management (KIM) Multi-Strategy risk-based allocations aim to provide investors the most optimal characteristics of both active and passive investing. Depending on an investor's goals, our investment team methodically combines the best features of both our established strategic and dynamic programs to arrive at the desired portfolio solution.

OPPOSITES ATTRACT

Kingsview Investment Management believes that active, opportunistic solutions require a strong underlying methodology to provide the highest potential value. Flexible, but opportunistic, allocation adjustments are designed to create uncorrelated return profiles to traditional indices and lower standard deviation in the process.

Kingsview Investment Management also believes that a passive, strategic perspective paired with periodic rebalancing will result in the possibility to achieve superior risk-adjusted returns versus an underlying benchmark.

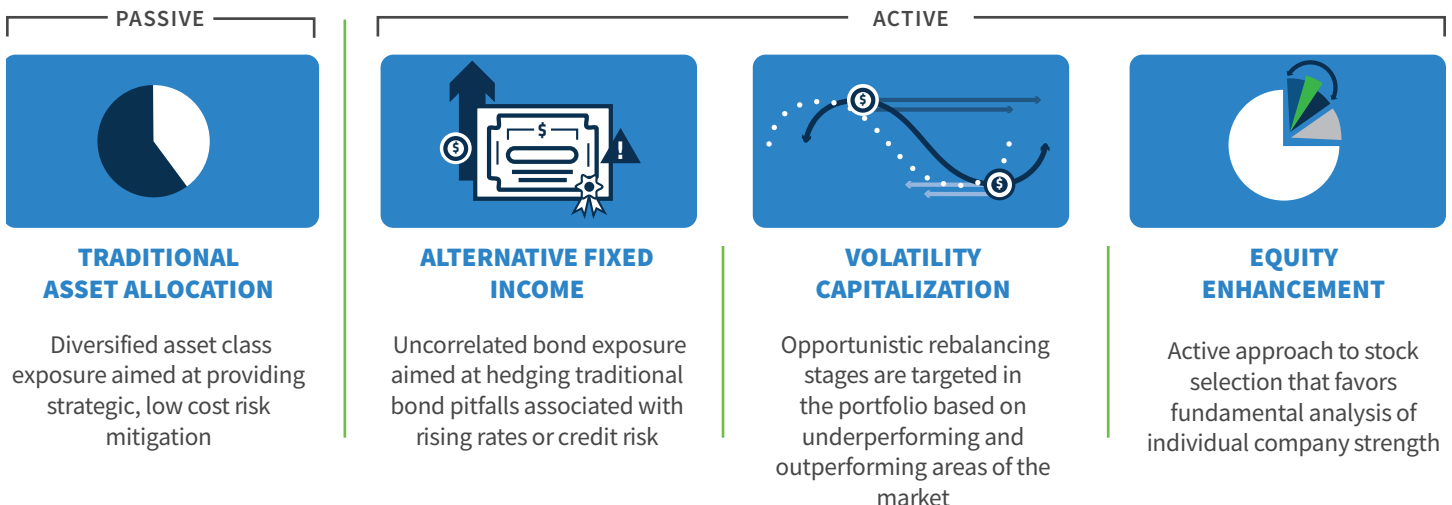
A combination of active and passive investments brings the best characteristics of both strategies in one portfolio. These portfolios may be appropriate for a variety of investor objectives and risk profiles.

	Active	Passive	Multi-Strat
Potential benefits of active and passive			
LOW COST		✓	✓
LOW DOWNSIDE CAPTURE	✓		✓
INDEX-LIKE RETURN		✓	✓
ALPHA POTENTIAL	✓		✓
LOW TRACKING ERROR		✓	✓
FLEXIBILITY	✓		✓

PORTFOLIO PROCESS

An "Active & Passive" approach has been widely adopted and accepted by the investing community. The idea is to apply diversified risk exposure to the foundation of an investor's portfolio and incorporate satellite investments that either compliment or hedge the strategic foundation throughout various market cycles.¹

The Kingsview Investment Management Multi-Strategy portfolios deploys an "Active & Passive" approach by engaging portfolio processes of multiple KIM Portfolios:



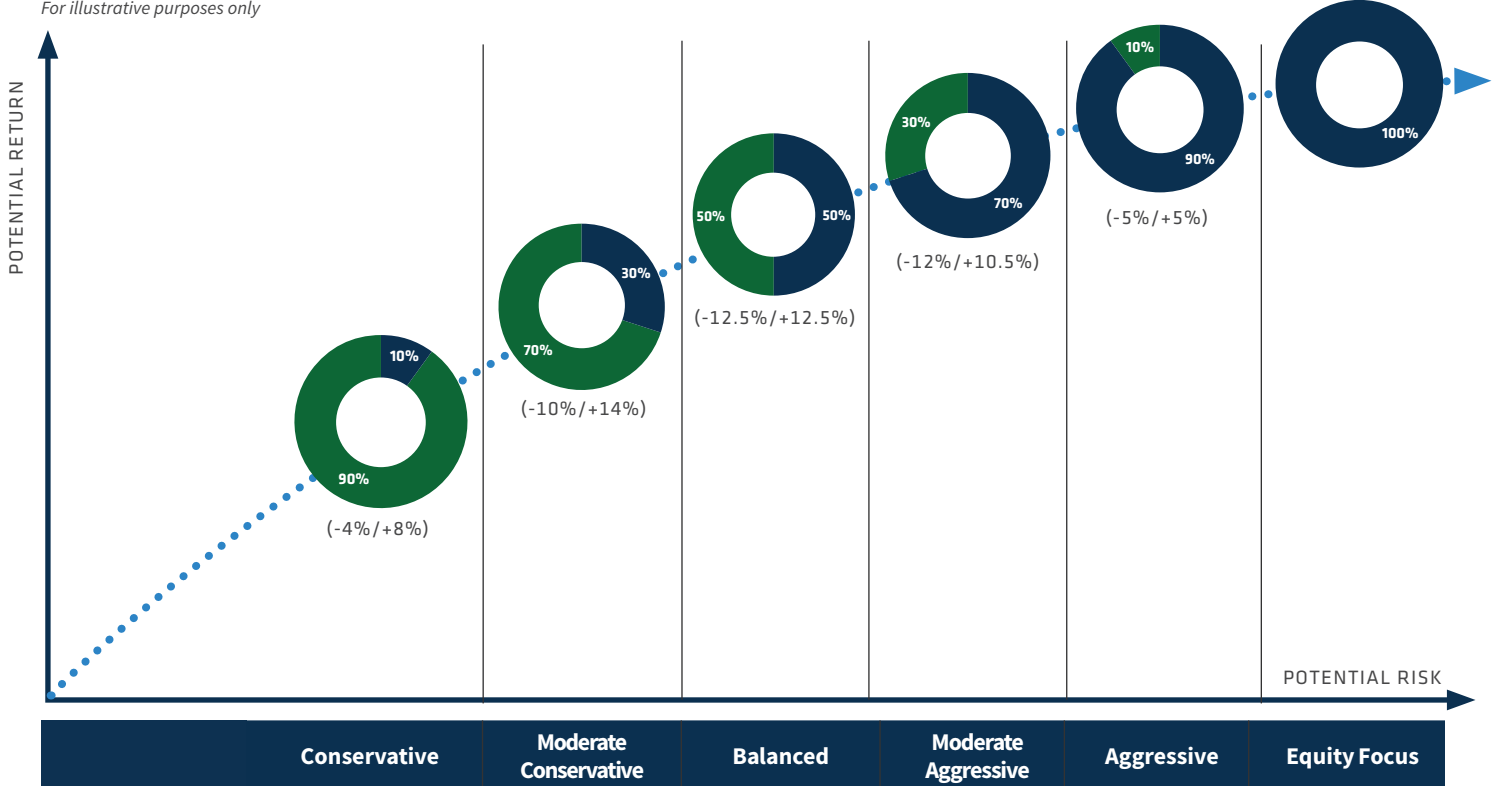
¹Diversification does not guarantee a profit or eliminate the risk of loss.

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EFFICIENT FRONTIER OF MULTI-STRATEGY PORTFOLIOS

For illustrative purposes only



TYPICAL TARGET ALLOCATION

As of 12/31/2025. Subject to change without notice.

	Conservative	Moderate Conservative	Balanced	Moderate Aggressive	Aggressive	Equity Focus
CASH	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%
EQUITY	10.00%	35.00%	50.00%	65.00%	88.00%	98.00%
FIXED INCOME	88.00%	63.00%	48.00%	33.00%	10.00%	0.00%

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