

# Moderate Select



## Objective

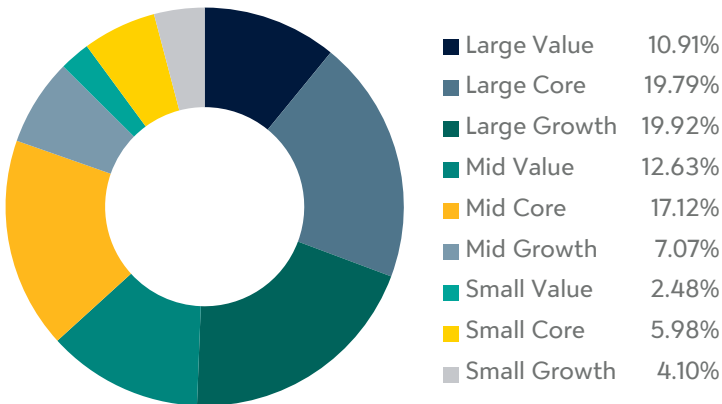
The strategy seeks long-term capital appreciation by investing in a diversified portfolio of growth and value stocks.

Inception Date	5/31/1997
Number of Holdings	75
Composite Assets	\$35.62 Million
Short Name	MSEL

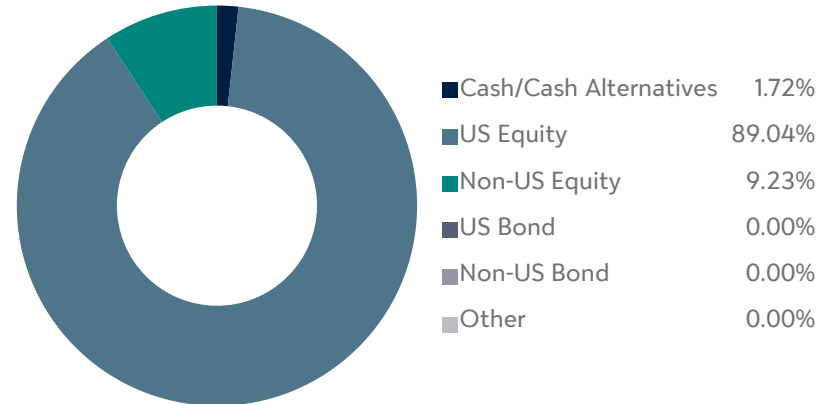
## What is the Moderate Select Strategy?

- Combines top-ranked stocks from other Moran Wealth Management proprietary value and growth strategies.
- Invests in a blend of undervalued and high growth potential mid and large-capitalization companies.

## Equity Style



## Asset Allocation



## Top 10 Holdings

Holding	Allocation
SPDR® S&P 500 ETF Trust	4.32%
iShares Russell 1000 Value ETF	4.22%
Lennar Corp Class A	2.71%
Humana Inc	2.40%
Cash/Cash Alternatives	1.70%
Williams-Sonoma Inc	1.62%
Novo Nordisk A/S ADR	1.59%
Regeneron Pharmaceuticals Inc	1.54%
Intuit Inc	1.53%
Simpson Manufacturing Co Inc	1.52%

## Sector Diversification

Sector	Allocation
Communication Services	1.89%
Consumer Cyclical	18.10%
Consumer Defensive	4.71%
Energy	7.59%
Financial Services	4.14%
Healthcare	15.14%
Industrials	22.71%
Materials	9.55%
Real Estate	1.52%
Technology	14.34%
Utilities	0.31%

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Portfolio shown is as of 12/31/2023 and subject to change. As portfolios are separately managed the individual client account holdings will vary, perhaps significantly, from those listed on this factsheet. Information, such as industry sector allocation percentages and market capitalization allocation percentages, will also vary from the information listed on this factsheet. A client opening an account today may, or may not, be invested in securities or sectors based upon the percentages shown on this factsheet. For the most recent portfolio composition please contact the Portfolio Manager.