

# Moderate Select

## Objective

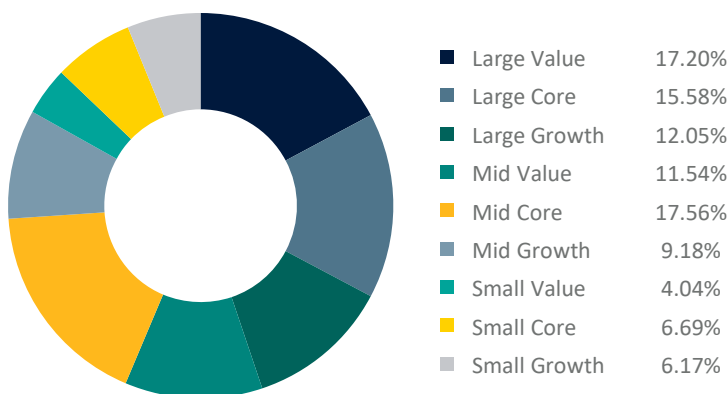
The strategy seeks long-term capital appreciation by investing in a diversified portfolio of growth and value stocks.

Inception Date	5/31/1997
Number of Holdings	77
Composite Assets	\$39.70 Million
Short Name	MSEL

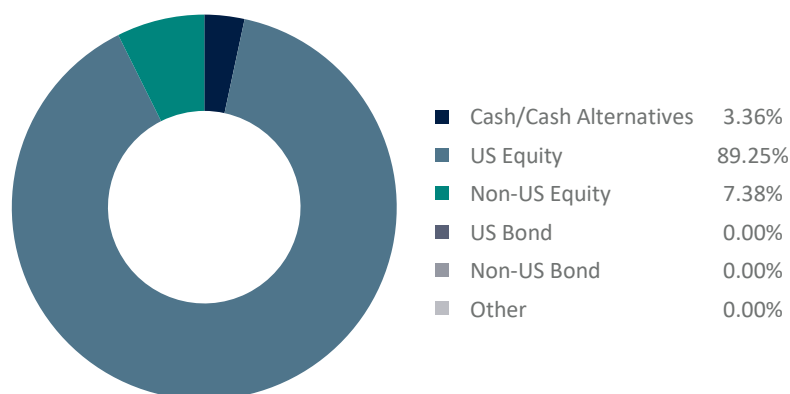
## What is the Moderate Select Strategy?

- 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
Cash/Cash Alternatives	3.36%
PulteGroup Inc	2.34%
Booking Holdings Inc	1.56%
Williams-Sonoma Inc	1.50%
Dick's Sporting Goods Inc	1.45%
Dillard's Inc Class A	1.42%
Alphabet Inc Class C	1.41%
Cummins Inc	1.39%
FedEx Corp	1.37%
Northrop Grumman Corp	1.34%

## Sector Diversification

Sector	Allocation
Communication Services	2.80%
Consumer Cyclical	20.04%
Consumer Defensive	3.58%
Energy	7.84%
Financial Services	2.61%
Healthcare	16.58%
Industrials	25.06%
Materials	9.11%
Real Estate	1.23%
Technology	11.15%
Utilities	0.00%

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Portfolio shown is as of 03/31/2024 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.