

Macroeconomic



Objective

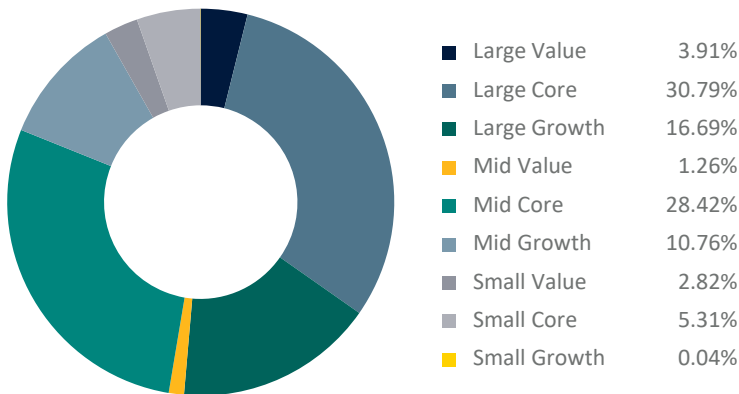
This strategy seeks to provide higher risk-adjusted returns than the S&P 500 Index by holding securities that will benefit from changes in the economic climate.

Inception Date	12/31/2012
Number of Holdings	37
Composite Assets	\$320.52 Million
Short Name	ECON

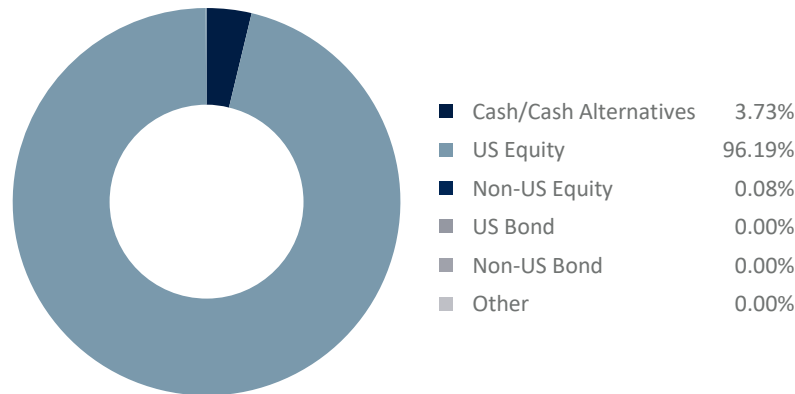
What is the Macroeconomic Strategy?

- Uses a macroeconomic factor-based screening methodology to select securities Moran Wealth Management believes will benefit from expected changes in the global economy.
- Looks at forward-looking economic variables to score companies based on where the firm's Investment Committee believes the economy will look in next 6 to 9 months.
- The strategy seeks to create a diversified portfolio that maintains upside potential with reduced downside volatility.

Equity Style



Asset Allocation



Top 10 Holdings

Holding	Allocation
Invesco S&P 500® Equal Weight ETF	4.88%
SPDR® S&P 500® ETF	4.03%
Cash/Cash Alternatives	3.72%
Motorola Solutions Inc	3.44%
Linde PLC	3.36%
NetApp Inc	3.22%
Microsoft Corp	3.20%
Cadence Design Systems Inc	3.17%
Progressive Corp	2.60%
Cencora Inc	2.55%

Sector Diversification

Sector	Allocation
Communication Services	5.27%
Consumer Cyclical	8.63%
Consumer Defensive	0.63%
Energy	0.40%
Financial Services	14.10%
Healthcare	11.53%
Industrials	18.75%
Basic Materials	3.76%
Real Estate	2.99%
Technology	33.49%
Utilities	0.44%

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Past performance does not guarantee or indicate future results. For more information about all investment strategies and their objectives please contact the Portfolio Manager.

Management and results displayed herein prior to 8/20/2022 were achieved under a different firm prior to MWM becoming registered as an investment adviser. The accounts managed at the predecessor firm were, however, achieved by the same personnel and were managed substantially similar to the accounts managed at MWM.

Portfolio shown is as of 3/31/2025 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.