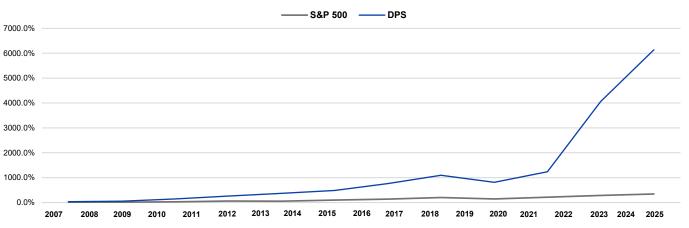


# | CORE Nasdag Stock Model

#### FOR ADVISOR USE ONLY

Model Name: CORE. Nasdaq 100 Start Date: 2006-12-31 Portfolio Return\*: 6138.79% Current Value: \$623,879.40

End Date: 2025-09-30



\*returns are hypothetical

Performance	2025	2024	2023	2022	2021	2020
CORE STOCK	50.01%	211.05%	46.66%	-23.80%	38.48%	47.95%
Benchmark	15.08%	23.67%	26.29%	-18.11%	28.71%	18.40%

Performance	2019	2018	2017	2016	2015	2014
CORE STOCK	24.25%	29.79%	48.05%	58.98%	15.32%	33.41%
Benchmark	31.49%	-4.38%	21.83%	11.96%	1.38%	11.96%

### **Fundamentals**

Stock Model				
QTD 2025	45.17%	3-Year*	55.33%	
YTD 2025	50.01%	5-Year*	50.98%	
1-Year	141.13%	Inception*	24.66%	

\*figures are annualized

Sample Model Exposure		
TSLA	AXON	
NFLX	CSCO	
AAPL	META	
BKR	HON	
ADSK	NVDA	
XEL	ADP	
COST	PAYX	
CCEP	GOOGL	
APP	PLTR	
MRVL	FTNT	
GILD	PYPL	

## Overview

## **Stock Model**

The DPS Nasdag Growth Stock Model focuses on strategic capital growth through active asset allocation aligned with the Nasdaq 100 index. This model invests in stocks within the index, leveraging its high-growth potential. Additionally, it evaluates global opportunities by incorporating international market sectors to complement domestic holdings. The strategy is designed to capture returns by emphasizing stocks demonstrating strong performance metrics. With an average of 9-12 trades per year, the model is actively managed to respond to changing market conditions, ensuring adaptability and sustained growth potential.



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