



SEPTEMBER 2025 PERFORMANCE RESULTS

An overview of our three portfolios to date.

Performance to September 30, 2025	YTD	6 Mo	1 Yr	3 Yr**	5 Yr**	10 Yr**	Inception**
Hillside Balanced Growth*	8.05%	5.89%	11.46%	17.64%	10.60%	9.54%	10.27%
HBG Benchmark ¹	12.81%	12.65%	16.29%	16.68%	10.14%	8.61%	7.60%
Hillside Focused Growth*	9.58%	8.04%	14.63%	24.49%	15.09%	11.03%	11.51%
HFG Benchmark ²	16.95%	17.44%	22.61%	22.34%	14.90%	11.73%	10.08%

Past performance is not an indication of future returns.

* Performance is presented gross of fees.

**Inception: Sept 2, 2014. Results beyond 1 year are annualized.

¹ Hillside Balanced Growth Benchmark: 75% Vanguard Balanced ETF & 25% Vanguard All-Equity ETF

² Hillside Focused Growth Benchmark: 100% Vanguard All-Equity ETF

Source: SIACharts.com

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Performance is calculated using month-end market values of the model portfolio. Since we use a model portfolio to calculate performance there are no client-initiated cash flows (deposits/withdrawals) to account for.

Performance is calculated by dividing the change in the model portfolio's market value by the model portfolio's market value at the beginning of the performance period. Also, all income generated by the portfolio's holdings are held within the model portfolio in cash and is accounted for in the portfolio's month-end market value - this results in a total return measure of the model's performance.

Returns for periods less than 1 year are shown as periodic returns while returns for periods greater than 1 year are annualized. Returns do not include fees and actual returns experienced by an investor may differ from those shown. Past performance is not a guarantee of future results.