

From: [Eric Clark](#)
To: [Marketing](#)
Subject: Fwd: HSUTX 3YR Returns
Date: Thursday, July 1, 2021 5:58:30 PM
Attachments: [image001.png](#)

Here's the VOL Management Statistics for the new section in the brands fact sheet. I think replacing the country exposures under the sectors is good place to highlight the important stats associated with this thematic and approach. Lmk if you need anything else
Thanks!

E

Eric M. Clark
Portfolio Manager
Dynamic Brands: HSUTX
A 5-Star Flexible Equity Fund
Investors Choice Award-Equity Funds
@DynamicBrands on Twitter

To schedule a quick call:
<https://calendly.com/pmcall-dynamicbrandsfund-hsutx/hsutx?month=2021-05&back=1>

310.776.0501

Brands Video: <https://www.globalbrandsmatter.com>

Consumer Blog:
<https://catalyst-insights.com/category/consumer-trends/>

Consumer Brochure:
<https://static1.squarespace.com/static/5d0d78911f2ae70001401b6b/t/6089d2e5de16e415ed730323/1619645164861/DynamicBrandsBrochure-2021-Final.pdf>

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From: Jens Jensen <jens.jensen@accuvest.com>
Sent: Thursday, July 1, 2021 1:54 PM
To: Eric Clark
Subject: HSUTX 3YR Returns

Annualized Return Since Inception

Time Period: 7/1/2018 to 6/30/2021 Calculation Benchmark: S&P 500 TR USD

	Return	Std Dev	Alpha	Beta	Sortino Ratio	Sharpe Ratio (arith)	Tracking Error	Down Capture Ratio
Rational Dynamic Brands Instl	25.33	17.54	7.47	0.88	2.41	1.37	6.98	70.97
S&P 500 TR USD	18.67	18.52	0.00	1.00	1.48	0.94	0.00	100.00

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