

Huskie Investment Partners Aggressive Growth Portfolio

As of March 31, 2024

About the Portfolio

The objective of the Huskie Aggressive Growth Portfolio is to produce long-term capital appreciation by identifying companies in the emerging growth phase of their lifecycle, which have the potential to become the “blue chip” stocks of the future. This portfolio is appropriate for investors seeking capital appreciation, with the ability to withstand potentially greater short-term volatility.

We are specifically interested in companies that are creating or disrupting an industry by providing a product or service that is superior, less expensive, or more efficient than what existed previously, and with revenue, earnings, and cash flow growth expectations of 10% or higher. For this reason, the portfolio skews significantly towards technology and healthcare companies. While many of these companies may not yet be profitable, we must see a clear path to profitability, and have high conviction in management’s approach to R&D, marketing, and operations. While the portfolio is primarily focused on U.S. equities, we may use ETFs or ADRs for sector-specific or international exposure.

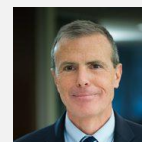
Why Invest in Huskie Aggressive Growth

Huskie Equity is a “real money” portfolio, not a hypothetical model. Rick Wholey is an experienced manager with personal capital invested in the portfolio. We take pride in the fact that we own the same securities as our clients, and we’d never ask clients to invest in something that we wouldn’t own ourselves. We believe that is the best way to obtain true objectivity and avoid conflicts of interest.

Top 10 Holdings	Ticker	Allocation %*
NVIDIA CORP	NVDA	8.99
CROWDSTRIKE HOLDINGS INC CL A	CRWD	5.47
AXON ENTERPRISE INC	AXON	5.34
ARISTA NETWORKS INC	ANET	4.95
TRADE DESK INC (THE) CL A	TTD	4.47
MERCADOLIBRE INC	MELI	4.30
AIRBNB INC CL A	ABNB	4.22
SYNOPSYS INC	SNPS	4.06
SITEONE LANDSCAPE SUPPLY INC	SITE	3.97
CROCS INC	CROX	3.88

*Portfolio currently maintains 32 equity positions

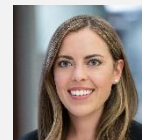
PIM Manager



Rick Wholey, CFP®
Managing Director
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Rick Wholey concentrates on equity portfolio management for Huskie Investment partners, and delivering advanced financial planning strategies for clients of The Wholey Poitras Group. Rick joined Baird in 2006 following two decades with Wayne Hummer Investments, ultimately serving as one of 20 partners, with responsibilities including oversight of sales, the firm’s research department, and expanding its product offerings. Rick has been named to Forbes’ list of “Best-in-State Wealth Advisors” since 2019.

Portfolio Support



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All investments carry risk, including loss of principal and no investment strategy is guaranteed to be successful. Investors should consider the investment objectives and risks of an investment in the strategy carefully before investing. This and other information can be found in the strategy supplement, which may be obtained by contacting the Wholey Poitras Group at 800-537-9854.

This information does not provide recipients with information or advice that is sufficient on which to base an investment decision. This document does not take into account the specific investment objectives, financial situation, or need of any particular client and may not be suitable for all types of investors. The holdings identified herein are subject to change without notice and should not be regarded as recommendations. Recipients should consider the contents of this fact sheet as a single factor in making an investment decision. Additional fundamental and other analyses would be required to make an investment decision about any individual security identified in this document.

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