



iSectors® CryptoBlock® Allocation

CryptoBlock® is a strategic model designed to provide investors access to the digital economy’s groundbreaking technological advancements brought about by cryptocurrencies and blockchain technology.

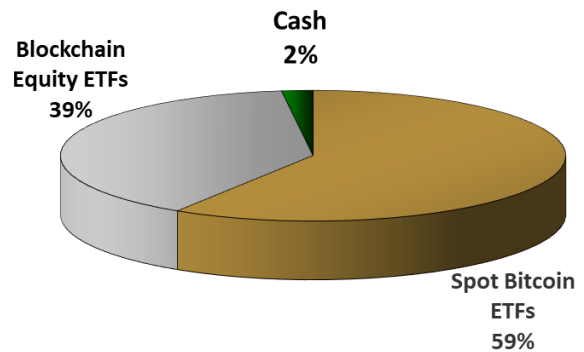
Portfolio Description

The iSectors® CryptoBlock® Allocation is a uniquely-positioned model investment portfolio designed to give advisors and their clients the opportunity to take advantage of the continuous and rapid adoption of cryptocurrencies and the underlying evolution of the technology that makes them possible: blockchain technology. Cryptocurrencies and blockchain technology investing can present advisors with some distinct compliance and reporting challenges. The iSectors® CryptoBlock® Allocation’s investment strategy aims to simplify regulatory, transaction, custody and performance reporting by accessing cryptocurrencies, and companies implementing blockchain technology through widely available, liquid, and transparent ETFs. The model portfolio concentrates on one cryptocurrency (Bitcoin) and one market sector (technology). Therefore, the iSectors® CryptoBlock® Allocation aligns best with investors that have an extremely high-risk tolerance.

A Brief History of Bitcoin and the Blockchain

From its humble beginning as a whitepaper written in 2008 by a yet unidentified individual named Satoshi Nakamoto, the global Bitcoin market capitalization has grown hundreds of billions of dollars. Besides being owned by an estimated 100,000,000 individuals (as of February 2024), many publicly-traded companies, hedge funds, family offices, and other institutional investors have invested billions of dollars in Bitcoin. A growing number of businesses now accept Bitcoin as payment for their goods and services.

Asset Allocation¹



Equally important, companies are applying blockchain technology in innovative ways to improve service, track distribution, improve pricing transparency, verify the authenticity of products and maintain confidentiality. Companies can also use blockchain technology in revolutionary ways to secure private and intellectual property rights, eliminate concerns of voting fraud, guarantee privacy and control of personal data on social media, the privacy of medical and genetic information, and much more.

For more detailed fee/performance/holdings information, please visit the iSectors website for the most recent fact sheet.

¹The sample target allocation/holdings information should not be considered a recommendation to buy or sell a particular security. There is no assurance that any specific securities listed will remain a part of the model. An investment in any iSectors® allocation model is not guaranteed and, at any given time, may be worth more or less than the amount invested.

iSectors® CryptoBlock® Allocation



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