BUILT FOR FIDUCIARIES · BY FIDUCIARIES · POWERED BY DATA SCIENCE

Introducing ERS's ALPHA ALGORITHMICS™

One Decade. Seven Models. Zero Exceptions. ALPHA ALGORITHMICS™ outperformed the S&P 500.

The ERS **ALPHA ALGORITHMICS™** system identifies stocks meeting specific quantitative criteria as they qualify — on each stock's own schedule. Across a 10-year historical study (December 2013 through December 2023), every one of ERS's seven models significantly outperformed the S&P 500 on a one-year holding basis. **Average excess return across all seven models: 42.8%.**

7 for 7
Models That Beat the S&P 500

42.8%
Average Excess Return vs. S&P

75%
Average Stock Gain Frequency

SEVEN ERS STOCK SELECTION MODELS
1-YEAR HOLDING PERIOD RETURNS

10-Year Study: December 2013 – December 2023
Equal-weighted comparison vs. S&P 500

Model	Cos.	Model Return	S&P 500	Excess	% Gains
AA X-F™ ALPHA ALGORITHMICS X-FACTOR™	65	**123.1%**	33.3%	**+89.8%**	77%
AA 14™ ALPHA ALGORITHMICS 14™	79	**87.2%**	29.6%	**+57.6%**	76%
IA 1™ INCOME ALGORITHMICS 1™	198	**63.1%**	28.6%	**+34.5%**	74%
AA 7™ ALPHA ALGORITHMICS 7™	5	**59.4%**	13.5%	**+45.9%**	80%
MCR 1™ MICRO-CAP RATINGS 1™	143	**56.0%**	21.4%	**+34.6%**	55%
AA 22™ ALPHA ALGORITHMICS 22™	37	**49.4%**	23.7%	**+25.7%**	89%
AA 18™ ALPHA ALGORITHMICS 18™	122	**36.4%**	24.6%	**+11.8%**	72%

ERS Model Return (1-year) S&P 500 Return (same holding period)

> **These models don't predict the future.** They identify stocks that have historically demonstrated specific financial characteristics — and they document what happened next.
> **A decade of data is not an accident. It is evidence.**
> *— Raymond M. Mullaney, Founder & CEO,* EQUITY RISK SCIENCES *· 49 years of investment industry experience*

Built for fiduciaries, by fiduciaries. Transparent ratings. Proven by the numbers.
Full methodology available. We explain exactly how every model works.

ERS.ai
TheFiduciaryMandate.org

Alpha Algorithmics™ results reflect a historical simulation, not a portfolio. Each stock is identified on the first date it meets the model's criteria; returns are measured from that date over the stated holding period and compared against the S&P 500 for the identical period. Results do not represent actual client trading or account returns. Study period: December 31, 2013 – December 31, 2023. Past performance is not indicative of future results. For registered investment advisors and qualified institutional investors only.

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