BUILT FOR FIDUCIARIES · BY FIDUCIARIES · POWERED BY DATA SCIENCE

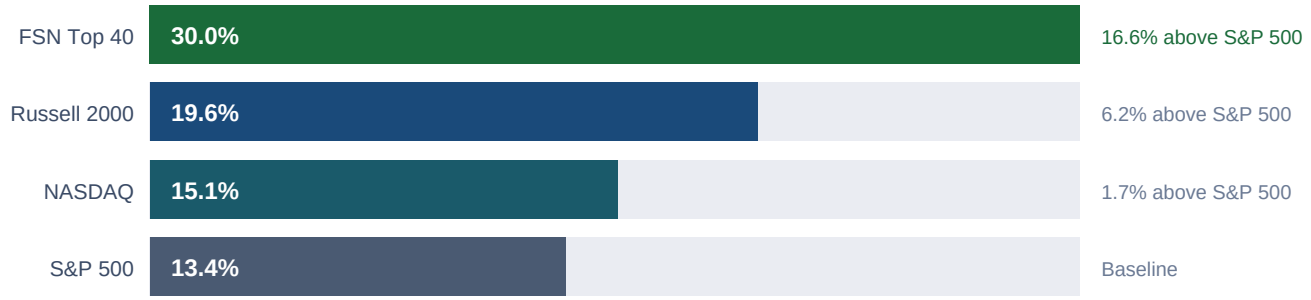
Introducing ERS's FIDUCIARY STOCK NAVIGATOR™

One Rating. 40 Stocks. 2.2× the S&P 500.

ERS's FIDUCIARY STOCK NAVIGATOR™ identified the top 40 stocks from 1,500 companies using a single proprietary quantitative rating. Nine months later: **30.0% total return.** No rebalancing. No human override.

30%	16%	78%	2.2×
9-Month Total Return	Excess Return vs. S&P 500	Stocks With Positive Returns	Return Multiple vs. S&P 500

PERFORMANCE VS. MAJOR BENCHMARKS June 6, 2025 – March 6, 2026 · Total Return



> On any day, every day, for 40 years — **ERS can document the results of every stock our ratings identified.** No research provider on Wall Street offers that transparency. And it is not a black box: we will explain exactly how every rating is constructed.
>
> *— Raymond M. Mullaney, Founder & CEO,* EQUITY RISK SCIENCES *· 49 years of investment industry experience*

Why the rating works — in plain terms. The FIDUCIARY STOCK NAVIGATOR™ scores every company on two questions: Is it financially strong enough to survive market stress? And are you paying a reasonable price relative to a conservative estimate of its intrinsic value? The rating is fully transparent — we explain every component to every client.

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

ERS.ai
TheFiduciaryMandate.org

The FIDUCIARY STOCK NAVIGATOR™ model portfolio was constructed on June 6, 2025 and posted live for ERS subscribers on that date. This is not a backtest. The 40 stocks were selected using only data available as of June 6, 2025. Subscribers could view the exact portfolio composition on the day it was created. Returns shown are total returns from June 6, 2025 through March 6, 2026, equal-weighted at inception with no rebalancing. Results represent model portfolio performance and do not reflect actual client trading or account returns. Past performance is not indicative of future results. For registered investment advisors and qualified institutional investors only.

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