



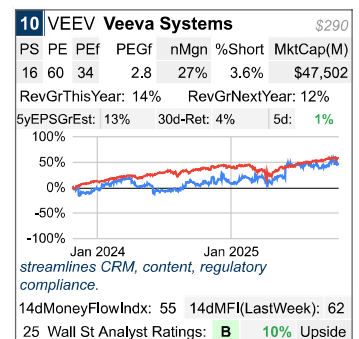
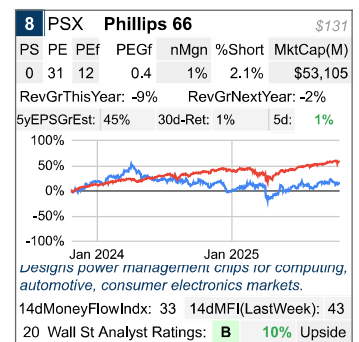
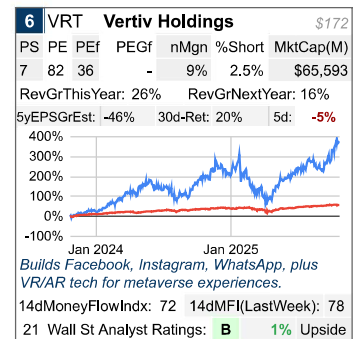
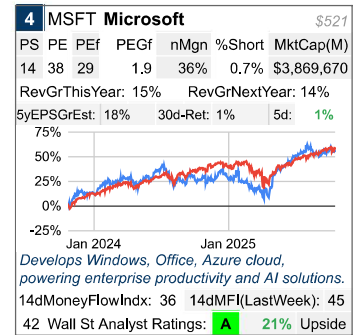
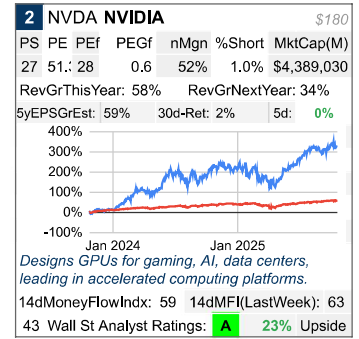
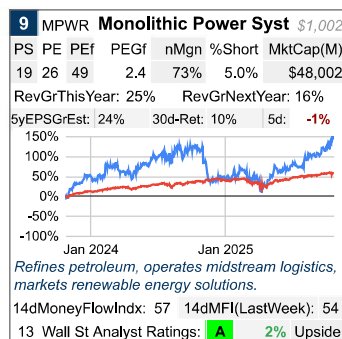
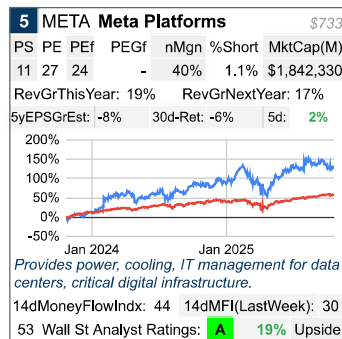
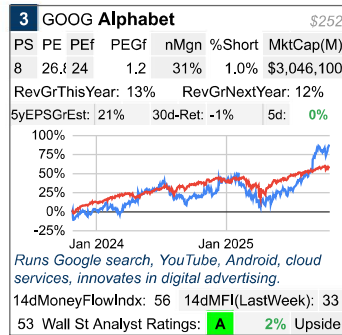
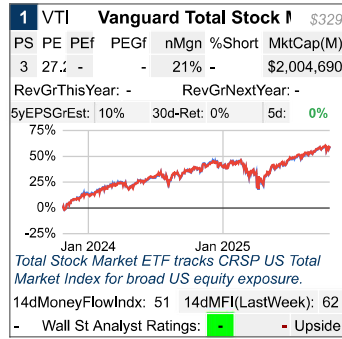
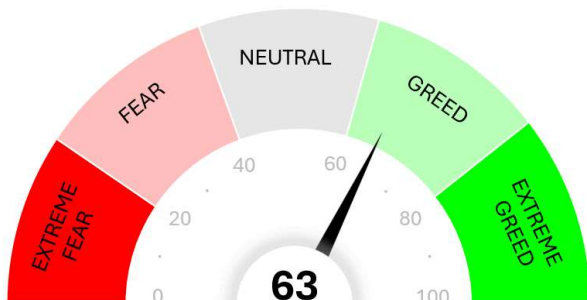
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Disciplined Growth Portfolio

The primary objective of the Disciplined Growth Portfolio is long-term capital appreciation. The strategy invests across market caps, styles and sectors (as you can see in the graphics below) and is customizable based on your own individual situation and tolerance for risk. For example, some securities in the portfolio are expected to experience more "fast" price movements (as you can see in the labels below). The goal of this report is to provide top investment ideas in a way to also help you consider aggregate portfolio risk exposures and diversification to serve your own unique situation. This is not investment advice.

1	VTI	Wgt: 10.1%	5d return: 0%	30d: 0%	Risk: Slow
Broad market exposure through low-cost, diversified ETF tracking total U.S. stock market index.					
2	NVDA	Wgt: 6.2%	5d return: 1%	30d: 2%	Risk: Med
Leader in AI chip market, dominating GPU supply for generative AI and data center growth.					
3	GOOGL	Wgt: 5.8%	5d return: 0%	30d: -1%	Risk: Med
AI-driven search and cloud growth, leveraging vast data for advertising and enterprise solutions.					
4	MSFT	Wgt: 5.4%	5d return: 1%	30d: 1%	Risk: Med
Cloud computing dominance with Azure, expanding AI integration across enterprise software.					
5	META	Wgt: 4.2%	5d return: 2%	30d: -6%	Risk: Med
Critical cooling solutions for AI data centers, riding megatrend of hyperscale infrastructure.					
6	VRT	Wgt: 4.1%	5d return: -5%	30d: 20%	Risk: Fast
Social media giant with AI-enhanced ad targeting, driving revenue growth in digital advertising.					
7	AMZN	Wgt: 4.0%	5d return: 1%	30d: -6%	Risk: Med
E-commerce and cloud leader, AWS fuels AI innovation with scalable computing infrastructure.					
8	PSX	Wgt: 3.5%	5d return: 1%	30d: 1%	Risk: Med
Power management chips in high demand for AI, automotive, and renewable energy applications.					
9	MPWR	Wgt: 3.4%	5d return: -1%	30d: 10%	Risk: Med
Refining capacity meets rising energy demand, with strong cash flows from integrated operations.					
10	VEEV	Wgt: 3.3%	5d return: 1%	30d: 4%	Risk: Med
Cloud-based healthcare software streamlines operations, benefiting from digital health trends.					

BH Market Sentiment Index



Red line is the S&P 500 (SPY), blue line is the company share price performance.

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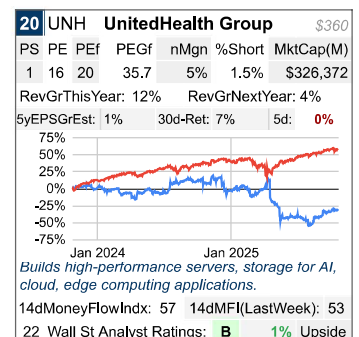
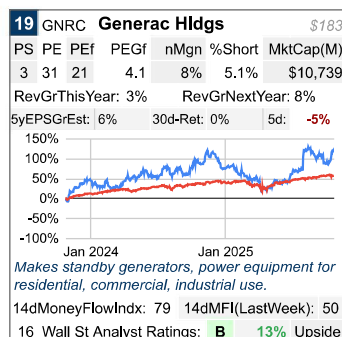
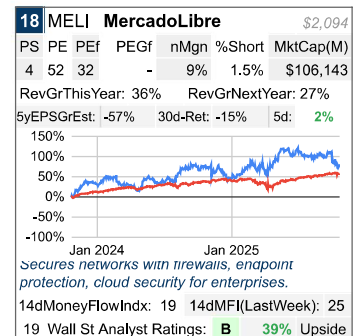
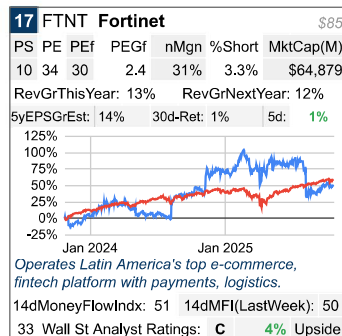
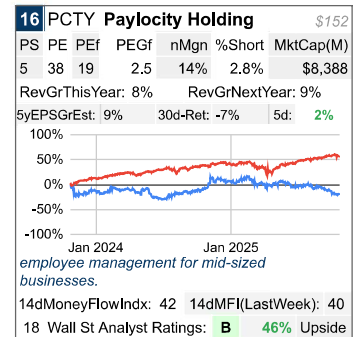
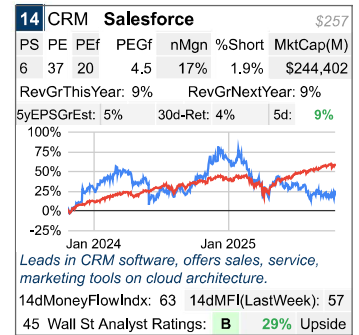
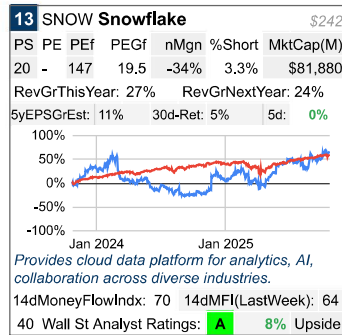
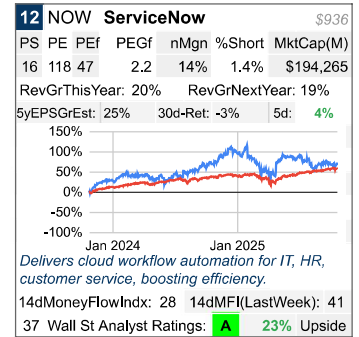
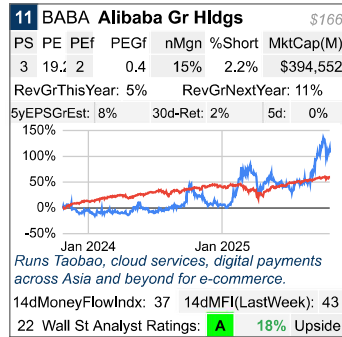


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Disciplined Growth Portfolio

11	BABA	Undervalued e-commerce giant, leveraging China's digital economy and cloud computing growth.	Wgt: 3.2% 5d return: 0% 30d: 2% Risk: Med
12	NOW	ServiceNow's AI-powered workflow automation drives digital transformation for enterprises.	Wgt: 3.2% 5d return: 9% 30d: -3% Risk: Med
13	SNOW	Snowflake's cloud data platform thrives on AI and big data analytics adoption surge.	Wgt: 3.0% 5d return: 0% 30d: 5% Risk: Med
14	CRM	CRM's AI-driven sales tools empower businesses, capitalizing on enterprise digitalization.	Wgt: 2.6% 5d return: 9% 30d: 4% Risk: Med
15	BLK	Asset management leader, benefiting from rising ETF demand and wealth management trends.	Wgt: 2.6% 5d return: -6% 30d: -1% Risk: Slow
16	PCTY	Cloud-based HR software streamlines payroll, riding remote work and automation megatrends.	Wgt: 2.4% 5d return: 2% 30d: -7% Risk: Med
17	FTNT	Latin America's e-commerce leader, capitalizing on region's digital payment and retail growth.	Wgt: 2.4% 5d return: 1% 30d: 1% Risk: Med
18	MELI	Cybersecurity innovator, leveraging AI to combat rising global cyber threats effectively.	Wgt: 2.4% 5d return: 2% 30d: -15% Risk: Med
19	GNRC	Backup power solutions thrive as data centers and renewable energy adoption surge rapidly.	Wgt: 2.1% 5d return: -5% 30d: 0% Risk: Med
20	UNH	AI server leader, providing high-performance computing for hyperscale data center growth.	Wgt: 2.1% 5d return: 0% 30d: 7% Risk: Slow

+/-	Port Weight	Market Sectors:	VTI Index Weight	+/-
11%	44.9%	Technology	33.6%	-
-5%	8.0%	Financial Services	13.4%	-
-3%	6.3%	Healthcare	9.4%	-
1%	11.7%	Consumer Cyclical	10.6%	-
3%	12.4%	Communication Services	9.8%	-
-1%	7.7%	Industrials	8.9%	-
-4%	0.5%	Consumer Defensive	4.7%	-
1%	3.8%	Energy	3.0%	-
1%	2.9%	Utilities	2.3%	-
-2%	0.3%	Real Estate	2.5%	-
-1%	1.1%	Basic Materials	1.9%	-
0%	0.0%	Other	0.0%	-
-	100%	Total	100%	-



Red line is the S&P 500 (SPY), blue line is the company share price performance.

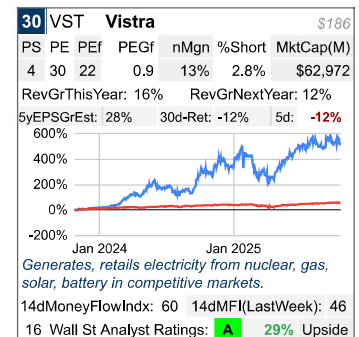
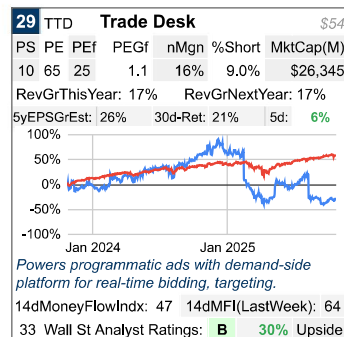
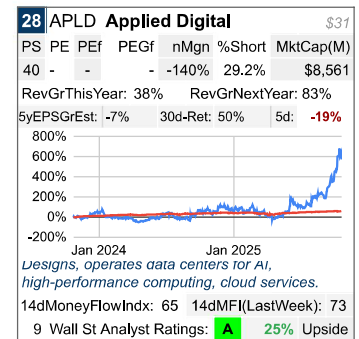
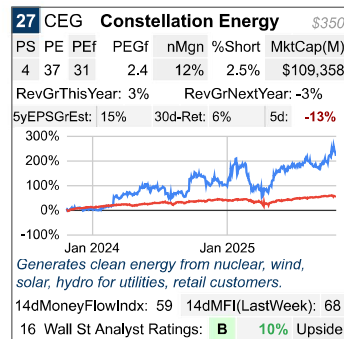
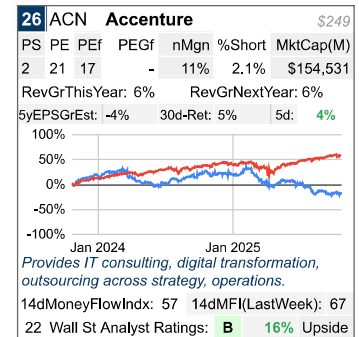
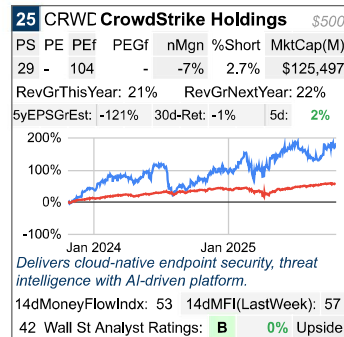
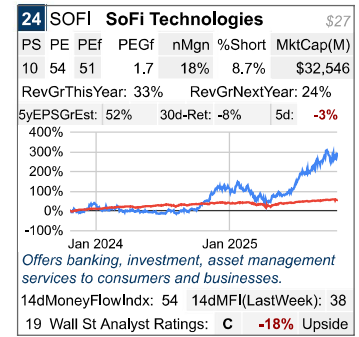
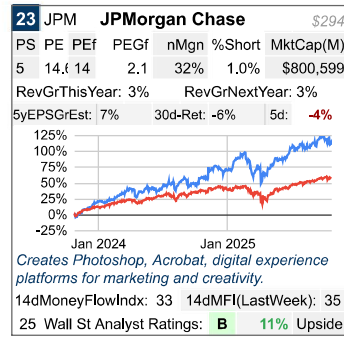
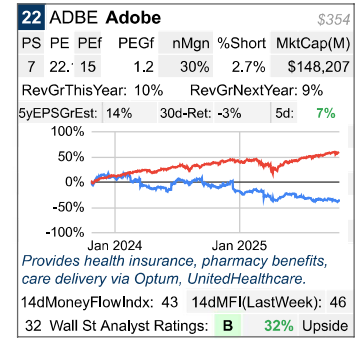
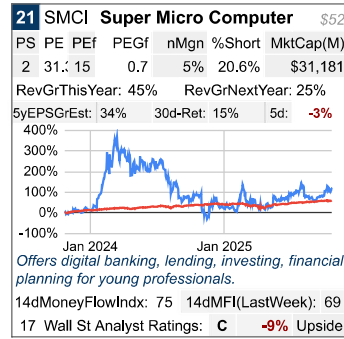
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Disciplined Growth Portfolio

21	SMCI	Digital banking innovator, capturing Gen Z with mobile-first financial services platform.	Wgt: 2.0% 5d return: -3% 30d: 15% Risk: Med
22	ADBE	Leading health insurer, leveraging data analytics to optimize care and reduce costs.	Wgt: 2.0% 5d return: -3% 30d: -3% Risk: Med
23	JPM	Creative software leader, integrating AI to enhance content creation and digital workflows.	Wgt: 2.0% 5d return: -4% 30d: -6% Risk: Med
24	SOFI	Strong banking franchise, benefiting from rising interest rates and robust loan demand.	Wgt: 2.0% 5d return: -3% 30d: -8% Risk: Fast
25	CRWD	CrowdStrike's AI-powered cybersecurity platform leads in protecting against evolving threats.	Wgt: 1.7% 5d return: 2% 30d: -1% Risk: Fast
26	ACN	Consulting giant, driving AI and digital transformation for global enterprise clients.	Wgt: 1.7% 5d return: 4% 30d: 5% Risk: Med
27	CEG	Nuclear energy leader, meeting rising clean energy demand for AI-driven data centers.	Wgt: 1.6% 5d return: -13% 30d: 6% Risk: Fast
28	APLD	Crypto mining innovator, leveraging low-cost energy for high-efficiency Bitcoin production.	Wgt: 1.4% 5d return: -19% 30d: 50% Risk: Fast
29	TTD	Ad tech leader, capitalizing on programmatic advertising growth in digital marketing.	Wgt: 1.2% 5d return: 6% 30d: 21% Risk: Fast
30	VST	Low-cost energy provider, powering AI data centers with sustainable electricity solutions.	Wgt: 1.1% 5d return: -12% 30d: -12% Risk: Fast



+/-	Port Weight*	10 Biggest US Stocks by Market Cap	VTI Index Weight	+/-
0.2%	6.9%	NVDA	6.7%	-
0.0%	6.0%	MSFT	6.0%	-
-5.3%	0.6%	AAPL	5.9%	-
1.1%	4.3%	AMZN	3.3%	-
2.0%	4.5%	META	2.5%	-
-1.4%	1.0%	AVGO	2.4%	-
3.8%	6.0%	GOOGL	2.2%	-
-1.6%	0.2%	GOOG	1.8%	-
-0.7%	1.2%	TSLA	1.9%	-
-1.3%	0.1%	BRK.B	1.4%	-
-	31%	Top 10 Total Weight	34%	-

*Includes additional security weight from ETF holdings breakdown.

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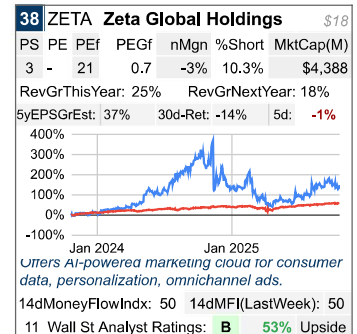
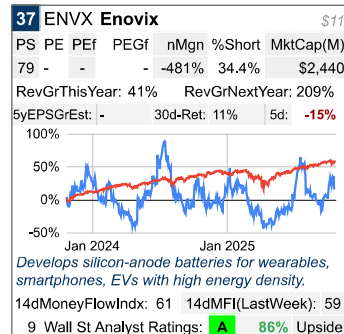
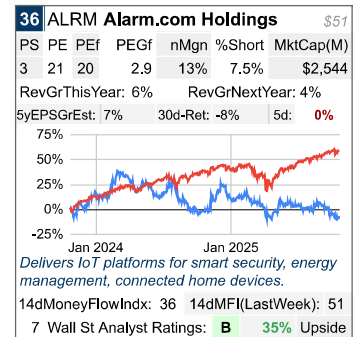
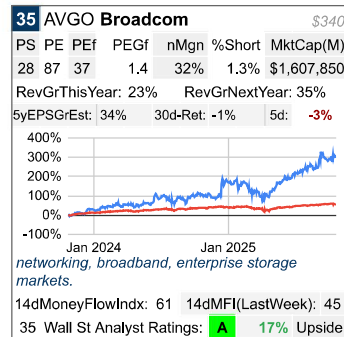
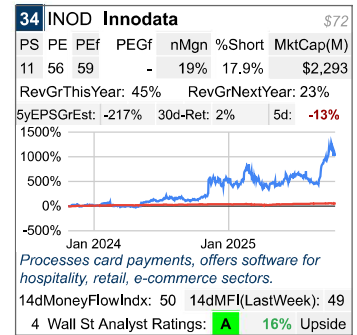
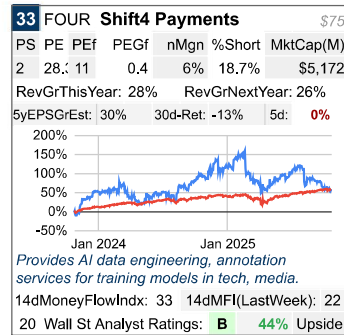
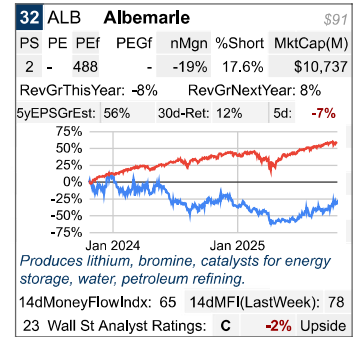
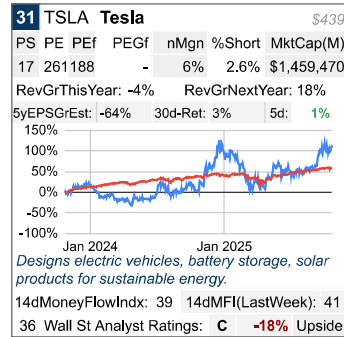
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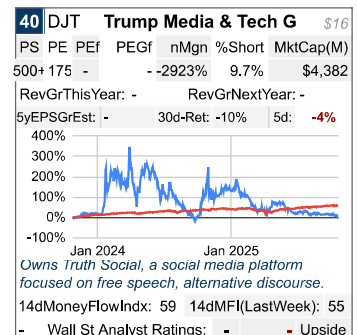
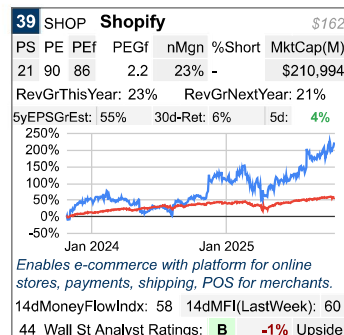
Disciplined Growth Portfolio

31	TSLA	EV and AI leader, scaling robotaxi services and energy storage for renewable megatrend.	Wgt: 1.0% 5d return: 1% 30d: 3% Risk: Fast
32	ALB	Lithium production leader, fueling EV battery demand as electric vehicle adoption surges.	Wgt: 0.9% 5d return: -13% 30d: 12% Risk: Fast
33	FOUR	AI and data analytics provider, enabling enterprises to leverage big data for efficiency.	Wgt: 0.9% 5d return: 0% 30d: -13% Risk: Fast
34	INOD	Payment processing innovator, thriving on e-commerce and digital transaction growth.	Wgt: 0.8% 5d return: -13% 30d: 2% Risk: Fast
35	AVGO	Semiconductor leader, dominating AI chip design and 5G connectivity solutions market.	Wgt: 0.8% 5d return: -3% 30d: -1% Risk: Med
36	ALRM	Smart home security innovator, leveraging AI for real-time monitoring and user growth.	Wgt: 0.7% 5d return: 0% 30d: -8% Risk: Med
37	ENVX	Next-gen battery tech, enabling EV and renewable energy storage with innovative solutions.	Wgt: 0.6% 5d return: -15% 30d: 11% Risk: Fast
38	ZETA	AI-driven marketing platform, optimizing customer engagement for e-commerce growth.	Wgt: 0.5% 5d return: -1% 30d: -14% Risk: Fast
39	SHOP	E-commerce platform leader, empowering small businesses with scalable digital solutions.	Wgt: 0.4% 5d return: 4% 30d: 6% Risk: Med
40	DJT	Social media and political engagement platform, capitalizing on free speech trends.	Wgt: 0.2% 5d return: -4% 30d: -10% Risk: Fast



Style Boxes:

The Disciplined Growth Portfolio				US Total Market Index (VTI) Benchmark						
		Value	Blend	Growth			Value	Blend	Growth	
Large		7.8%	35.9%	16.4%	Large		19.9%	34.9%	17.2%	
	Mid	4.1%	0.8%	23.1%		Mid		5.6%	8.3%	5.5%
	Small	0.3%	1.9%	8.9%			Small		2.9%	3.4%



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