

Investment Objective and Strategy

Lee Adaptive Large Cap Sector (LALCS) is a U.S. equity strategy that seeks to avoid exposure to severe market downturns while participating in up markets using an adaptive, proprietary quantitative model that adjusts its strategy and positioning as the tenor of markets evolve. Using sector-focused exchange-traded funds ("ETFs"), LALCS expects to be fully invested in a well-diversified equity portfolio most of the time but may hold some or all cash and cash equivalent securities when the model indicates that market expectations are turning negative. The decision to own or not own a sector ETF is based on a disciplined, consistent, and repeatable quantitative process. Each sector is rated on its medium-term prospects for appreciation, based on a variety of quantitative factors that include momentum and valuation. The strategy benchmark is the S&P 500 Index (Total Return).

Investor Profile

Designed for investors with a moderately aggressive risk tolerance who seek to participate in equity market performance but do not want to tolerate downside market volatility.

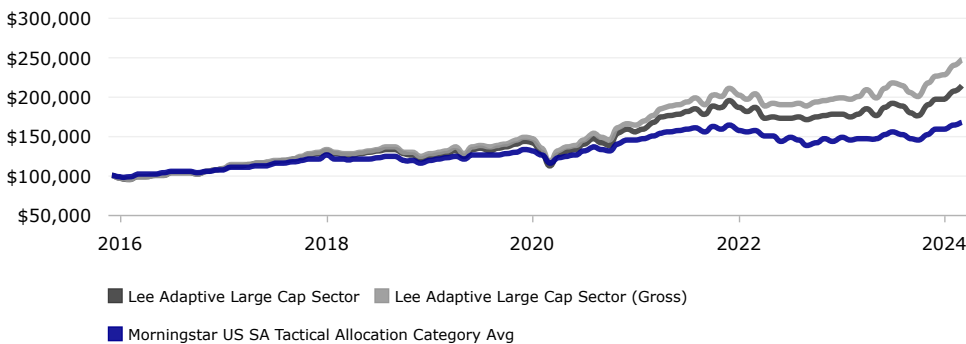
Risk Rating: Moderate-Aggressive Allocation



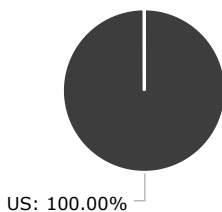
Portfolio Performance¹

	Qtr	YTD	1 Yr	3 Yr	5 Yr	10 Yr	Inception
Lee Adaptive Large Cap Sector	8.51%	8.51%	19.64%	8.49%	10.73%	-	9.60%
Lee Adaptive Large Cap Sector (Gross)	9.30%	9.30%	23.22%	11.77%	13.45%	-	11.56%
Morningstar US SA Tactical Allocation Category Avg	5.70%	5.70%	14.72%	3.83%	6.49%	-	6.46%

Growth of \$100,000²



Asset Allocation



Allocations are based on the asset class composition of the Portfolio and may be subject to change. There can be no assurance that the Portfolio composition has not changed since the report date shown above. Asset allocation does not assure a profit or guarantee protection during market downturns.

Benefits

3D Risk-Based Portfolios may offer significant diversification benefits, lower investment costs, greater tax efficiency and simplicity for investors seeking a professionally managed asset allocation solution. The Lee Adaptive model portfolio series was launched in 2016 using a data-driven, systematic investment approach to manage downside risk protection while participating in the rewards the equity markets have historically delivered over the long-term.

About Freedom

Freedom Investment Management, Inc. is an independent investment manager based in Hartford, CT, that offers a curated model marketplace to individual investors and retirement plans through independent advisors. These solutions are delivered through a turnkey asset management platform and directly to institutional retirement plans and other industry platforms.

Annual Returns¹

	Lee Adaptive Large Cap Sector	Lee Adaptive Large Cap Sector (Gross)	Morningstar US SA Tactical Allocation Category Avg
2024	8.51	9.30	5.70
2023	10.99	14.34	11.16
2022	-8.95	-6.16	-12.84
2021	22.86	26.54	13.31
2020	10.46	12.19	9.21
2019	18.48	19.94	15.23
2018	-5.38	-4.28	-5.29
2017	19.54	20.18	14.24
2016	6.83	7.36	6.09

Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets.

March 2024

Portfolio Holdings*

Name	Asset Class	Symbol	Holdings
Communication Services Sel Sect SPDR®ETF	US Fund Communications	XLC	23
Consumer Staples Select Sector SPDR® ETF	US Fund Consumer Defensive	XLP	39
Energy Select Sector SPDR® ETF	US Fund Utilities	XLE	26
Financial Select Sector SPDR® ETF	US Fund Financial	XLF	75
Health Care Select Sector SPDR® ETF	US Fund Health	XLV	65
Industrial Select Sector SPDR® ETF	US Fund Industrials	XLI	80
Materials Select Sector SPDR® ETF	US Fund Natural Resources	XLB	31
Real Estate Select Sector SPDR®	US Fund Real Estate	XLRE	34
Technology Select Sector SPDR® ETF	US Fund Technology	XLK	67
Utilities Select Sector SPDR® ETF	US Fund Utilities	XLU	31

Portfolio Characteristics³

Standard Deviation	12.59%
Sharpe Ratio	0.79
Portfolio Yield	1.71%
Number of Securities	525
Effective Duration	NA
Weighted Average Fund Expense	0.1%
Weighted Average Credit Rating	NA

Sector Breakdown

Technology	21.08%
Healthcare	10.79%
Financials	9.79%
Communication Services	9.49%
Consumer Discretionary	9.19%
Industrials	8.79%
Consumer Staples	7.19%
Energy	6.89%
Materials	5.79%
Real Estate	5.49%
Utilities	5.49%
Cash	0.00%

Index Performance

	3 mo	YTD	1 Year	3 Year	5 Year	5 Yr. Std Dev
S&P 500 TR	10.56%	10.56%	29.87%	11.50%	15.06%	18.21%
Russell 2000	4.81%	4.81%	17.87%	-1.46%	6.65%	23.68%
MSCI ACWI Net USD	8.20%	8.20%	23.22%	6.96%	10.92%	17.60%
MSCI EAFE	5.79%	5.79%	15.32%	4.78%	7.32%	17.77%
MSCI Emerging Markets	1.91%	1.91%	5.35%	-7.46%	-0.28%	18.83%
Bloomberg US Agg. Bond	-0.77%	-0.77%	1.13%	-2.64%	0.25%	6.09%

Credit Rating

No data filled

Disclaimer

Freedom Investment Management, Inc. ("Freedom") is an investment advisory firm registered with the Securities and Exchange Commission, and acts as investment adviser to 3D Global ETF Portfolios ("3D Portfolio(s)"). Freedom's 3D Portfolios claim compliance with the Global Investment Performance Standards (GIPS®). The 3D Global ETF Portfolios are structured based on capital market research, academic research, and other applications of portfolio management practices. For this and other information about Freedom, please read the firm's Form ADV Part 2 before investing. A copy may be requested by calling 860.291.1998. Any information in this presentation should not be copied, reproduced, duplicated, or transmitted without prior written consent of Freedom.

¹**Performance** The LALCS Composite includes all discretionary accounts that are managed to the LALCS Strategy which uses exchange-traded funds (ETFs) for U.S. sector equity exposures. Net Composite Returns shown above represent the composite return of actual client accounts. Actual client costs will vary based on account size and total value of household assets. Performance data shown represents past performance.

²**Growth of \$100,000** shown in the chart represents the cumulative total return of the 3D Portfolio composite since inception, both gross and net of fees. Investment return and principal value of an investment with 3D Portfolios will fluctuate so that an investor's investment when redeemed may be worth more or less than their original cost. As with any investment strategy, there is a potential for profit as well as the possibility of loss.

³**Portfolio Characteristics** may change over time. Average Fund Expense is the weighted average fund expense ratio based on the portfolio allocation and ETF holdings. Number of Securities is the sum total of securities held within each ETF. Portfolio Yield is the sum of net dividend per share amounts that have gone ex-dividend over the prior 12 months, divided by the current stock price. The yield is helpful in estimating the amount of income that can be expected to be generated from a Portfolio. Credit Rating is the portfolio-weighted rating of the underlying issues as assigned by Moody's and Standard & Poor's. Effective Duration (expressed in years) represents the portfolio's projected sensitivity to changes in interest rates - higher interest rates can lead to lower portfolio values and vice versa. Standard Deviation is a measure of the portfolio's volatility based on the dispersion of historical monthly returns from the mean over a five year period. A higher standard deviation indicates higher volatility of returns. Sharpe Ratio is a measure of risk-adjusted performance that indicates whether excess return was generated by portfolio management decisions or by taking on additional risk. The risk-free rate assumed for this calculation is based on annualized returns of 90-Day U.S. Treasury Bills. A higher Sharpe Ratio indicates a higher risk-adjusted return and is generally favorable.

⁴**Portfolio Holdings** information is as of March 31, 2024. There is no assurance that the specific securities listed will remain in the Portfolio. Asset allocation and portfolio holdings may differ from the model among accounts in the composite. 3D employs a diversification strategy using index-based exchange-traded funds ("ETFs") to represent specific asset classes in the Portfolio and should not be considered a recommendation to buy or sell a particular ETF security. As with all investments, ETFs have risks. For more detailed information on the ETFs used in 3D Portfolios investors may request a prospectus by contacting their advisor.

Performance is being shown for illustration purposes only and should not be relied upon. No representation or assurance is made that any investor will or is likely to achieve results comparable to those shown above or will make any profit or will be able to avoid incurring substantial losses. Past performance is not indicative, or a guarantee, of future results. This document does not constitute an offer to sell or a solicitation of an offer to purchase interests in any investment vehicles or securities. This document is not a prospectus, an advertisement, or an offering of any interests in either the Strategy or other portfolios. This document and the information contained herein is intended for informational purposes only. It does not constitute investment advice or a recommendation with respect to investment. Investing in any strategy should only occur after consulting with a financial advisor. To receive a GIPS report, please contact insights@freedomadvisors.com. GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.