

# SUNCOAST

## EQUITY MANAGEMENT

### Annualized Performance Through June 30, 2023

Net of Management Fees

Time Period	Select Growth	Russell 1000 Growth	S&P 500
Trailing Returns (%)	Net	Index	Index
1 Year	22.5	27.1	19.6
3 Year	12.0	13.7	14.6
5 Year	13.1	15.1	12.3
10 Year	13.5	15.7	12.9
Since Inception 25.5 Years (12/31/97)	9.8	8.6	8.1

Year	SEM*	S&P 500	Relative Results
1998	26.1%	28.5%	-2.4%
1999	24.1%	21.0%	3.1%
2000	4.5%	-9.1%	13.6%
2001	0.3%	-11.9%	12.2%
2002	-10.9%	-22.1%	11.2%
2003	20.1%	28.6%	-8.5%
2004	12.5%	10.9%	1.6%
2005	-0.5%	4.8%	-5.3%
2006	8.2%	15.8%	-7.6%
2007	10.1%	5.5%	4.6%
2008	-30.1%	-37.0%	6.9%
2009	24.7%	26.4%	-1.7%
2010	6.8%	15.0%	-8.2%
2011	4.3%	2.1%	2.2%
2012	19.2%	16.0%	3.2%
2013	36.2%	32.4%	3.8%
2014	10.0%	13.6%	-3.6%
2015	3.9%	1.4%	2.5%
2016	-2.9%	11.9%	-14.8%
2017	30.9%	21.8%	9.1%
2018	1.2%	-4.4%	5.6%
2019	35.7%	31.5%	4.2%
2020	26.7%	18.4%	8.3%
2021	27.4%	28.7%	-1.3%
2022	-23.3%	-18.1%	-5.2%
Q1 2023	9.1%	7.5%	+1.6%
Q2 2023	19.0%	16.9%	+2.1%
Since Inception (12/31/97 Overall Gain)	985.1%	636.0%	349.1%
Average Annual Gain	9.8%	8.1%	1.7%