

# SUNCOAST

## EQUITY MANAGEMENT

### Annualized Performance Through March 31, 2024

Net of Management Fees

| Time Period                               | Select Growth | Select Growth | S&P 500 |
|---|---------------|---------------|---------|
| Trailing Returns (%)                      | Gross         | Net           | Index   |
| 1 Year                                    | 32.5          | 31.4          | 29.9    |
| 3 Year                                    | 11.7          | 10.7          | 11.5    |
| 5 Year                                    | 16.5          | 15.4          | 15.0    |
| 10 Year                                   | 14.6          | 13.5          | 13.0    |
| Since Inception 26.25 Years<br>(12/31/97) | 11.4          | 10.3          | 8.6     |

| 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%            |
| 2023                                    | 31.5%    | 26.3%   | 5.2%             |
| Q1 2024                                 | 9.0%     | 10.6%   | -1.6%            |
| Since Inception (12/31/97 Overall Gain) | 1,206.6% | 779.1%  | 427.5%           |
| Average Annual Gain                     | 10.3%    | 8.6%    | 1.7%             |