SUNCOAST
EQUITY MANAGEMENT

Annualized Performance
Through September 30, 2026

Time Period	Select Growth	Select Growth	S&P 500
Trailing Returns (%)	Gross	Net	Index
1 Year	3.1	2.1	15.7
3 Year	15.0	13.9	22.9
5 Year	8.8	7.8	13.8
10 Year	15.5	14.4	15.3
Since Inception 28.75 Years (12/31/97)	11.2	10.1	9.4

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Performance results versus the Standard & Poors 500 Index (Net of fees)

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%
2024	23.1%	25.0%	-1.9%
2025	7.3%	17.9%	-10.6%
2026 Through 9/30	0.1%	12.7%	-12.6%
Since Inception (12/31/97 Overall Gain)	1,484.7%	1,221.2%	263.5%
Average Annual Gain	10.1%	9.4%	0.7%