

MarketGrader US Large Cap Select 50 Index

The MarketGrader U.S. Large Cap Select 50 Index tracks the 50 top-rated large cap companies in the U.S. equity market based on MarketGrader's proprietary GARP + Quality framework. Constituents are selected for their consistent ability to generate long-term economic value, measured through 24 fundamental indicators of growth, value, profitability, and cash flow.

Index Rules

Underlying Universe

The constituents of its parent index, the MarketGrader US Large Cap Core Index.

Objective

Designed to harness the returns from the large cap segment of the U.S. equity market, while adding alpha over time by selecting the segment's highest quality companies based on MarketGrader's methodology.

Weighting

Index constituent weights are based on each company's free float market capitalization, with the total Index weight per constituent capped at 10%.

Rebalance Frequency

Semi-annually on the third Friday of March and September.

Selection Criteria

On the Index's rebalance selection date, the 50 largest companies by total market capitalization from the parent Index (the MarketGrader US Large Cap Core Index) are selected, which then become the Index's constituents for the following six-month period.

Performance

Cumulative Total Return Dec. 2007 - Sep. 2025

All data as of September 30, 2025



Calendar Year Returns (%)

	MGUSLC50 TR	SPX TR	RUI TR
2025*	19.4	14.8	14.6
2024	37.1	25.0	24.5
2023	33.4	26.3	26.5
2022	-25.2	-18.1	-19.1
2021	32.8	28.7	26.5
2020	27.1	18.4	21.0
2019	38.5	31.5	31.4
2018	-2.9	-4.4	-4.8
2017	31.0	21.8	21.7
2016	10.5	12.0	12.1
2015	5.4	1.4	0.9
2014	15.5	13.7	13.2
2013	28.7	32.4	33.1
2012	13.0	16.0	16.4
2011	4.2	2.1	1.5
2010	11.3	15.1	16.1
2009	21.1	26.5	28.4
2008	-29.2	-37.0	-37.6

*YTD values through September 30, 2025
SPX = S&P 500 Index RUI = Russell 1000 Index

Annualized Returns (%)

	MGUSLC50 TR	SPX TR	RUI TR
3-Years	32.0	24.9	24.6
5 -Years	18.4	16.5	16.0
Since 12/31/07	13.5	11.1	11.0

Cumulative Returns (%)

	MGUSLC50 TR	SPX TR	RUI TR
3-Years	130.0	95.0	93.6
5 -Years	132.7	114.3	109.9
Since 12/31/07	845.6	542.9	537.4

Standard Deviation (%)

	MGUSLC50 TR	SPX TR	RUI TR
3-Years	16.9	14.4	14.7
5 -Years	18.0	15.7	16.0
Since 12/31/07	15.7	15.7	16.0

Return / Standard Deviation

	MGUSLC50 TR	SPX TR	RUI TR
3-Years	1.89	1.73	1.68
5 -Years	1.02	1.05	1.00
Since 12/31/07	0.86	0.70	0.69

Frequency: Monthly

Licensing opportunities

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The MarketGrader U.S. Core Select 50 Indexes were first published on August 2, 2023. All estimated daily historical closing prices prior to that date are based on back-testing (i.e., calculations of how the index might have performed in the past if it had existed). Backtested performance information is purely hypothetical and is solely for informational purposes. Backtested performance does not represent actual performance, and should not be interpreted as an indication of actual performance. Past performance is not indicative of future results. One cannot invest in an index.

MarketGrader US Large Cap Select 50 Index

Index composition data as of September 30, 2025



Index Bio

Average Market Cap (millions of USD)	\$474,567
Median Market Cap (millions of USD)	\$143,270
Average 3 Mo. Volume (Dollars)	\$2,340,037,446
Average 3 Mo. Volume (Shares)	15,329,916
Most Recent Rebalance	9/22/25
Companies Replaced	22
Sector with Biggest Increase	Financials
Sector with Biggest Decrease	Industrials
Companies Overlapping S&P 500	46

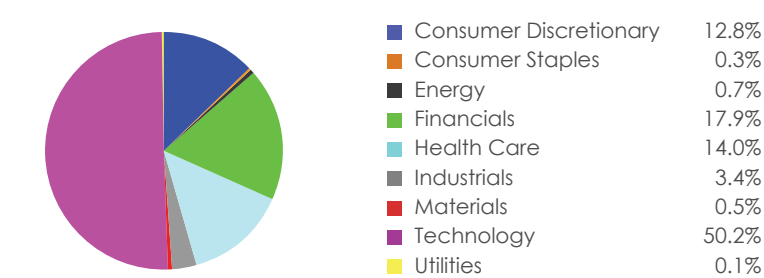
Fundamental Attributes

	Median
Trailing P/E Ratio	22.4
Forward P/E Ratio	19.9
Earnings Yield	4.3%
Price/Tangible Book Ratio	6.5
Revenue Change - 3 Years	37.9%
Operating Income Change - 3 Years	52.6%
Operating Margin	26.1%
Earnings per Share (EPS) 3-Year Growth	15.3%
Total Debt to Capital	37.6%
Return on Equity	30.2%
Dividend Yield	0.84%
Beta	1.02

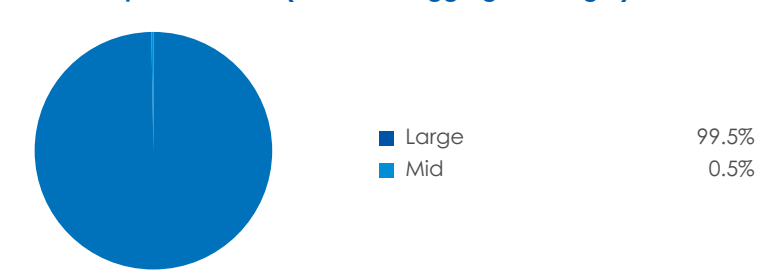
Median and Average Grades

	Median	Average
MarketGrader US Large Cap Select 50 Index	66.0	64.2
S&P 500 Index	50.4	51.1
Russell 1000 Index	46.0	46.9

Sector Breakdown (based on aggregate weight)



Market Cap Breakdown (based on aggregate weight)



Top 20 Stocks by Fundamentals

Ticker	Name	Grade
META	Meta Platforms Inc Class A	81.4
NEM	Newmont Corporation	79.8
NVDA	NVIDIA Corporation	78.9
ANET	Arista Networks, Inc.	78.8
GOOGL	Alphabet Inc. Class A	75.4
APH	Amphenol Corporation Class A	73.4
UBER	Uber Technologies, Inc.	72.1
MSFT	Microsoft Corporation	71.9
MU	Micron Technology, Inc.	71.3
LRCX	Lam Research Corporation	70.9
QCOM	QUALCOMM Incorporated	70.5
FOXA	Fox Corporation Class A	70.0
PGR	Progressive Corporation	68.7
PINS	Pinterest, Inc. Class A	68.6
RF	Regions Financial Corporation	67.8
FTNT	Fortinet, Inc.	67.6
AMT	American Tower Corporation	67.2
VRT	Vertiv Holdings Co. Class A	67.2
AMZN	Amazon.com, Inc.	66.8
LLY	Eli Lilly and Company	66.7

Stocks with the Most Selections Since Inception

Ticker	Name	Times
MSFT	Microsoft Corporation	33
GOOGL	Alphabet Inc. Class A	32
MA	Mastercard Incorporated Class A	30
AMGN	Amgen Inc.	26
QCOM	QUALCOMM Incorporated	26
V	Visa Inc. Class A	23
JNJ	Johnson & Johnson	23
TJX	TJX Companies Inc	22
ORCL	Oracle Corporation	21
GILD	Gilead Sciences, Inc.	21