

NorthStar Financial Initiates Theme and Revenue-Based Index Offering with NorthStar Tech Revolution Index

GREENVILLE, June 20, 2024: NorthStar Financial, one of South Carolina's leading financial and retirement planning providers, announced the launch of the NorthStar Tech Revolution Index, a theme and revenue-based benchmark that systematically identifies and measures companies that are pioneering new cutting-edge technologies and generating greater revenue versus competitors.

The NorthStar Tech Revolution Index is designed to track companies that are creating and developing new revolutionary technologies. These cutting-edge technologies are considered be difficult to replicate quickly and are generating substantial revenues that enable them to preserve market share and generate higher profits over the long-term according to Jim Pritchard, Chief Investment Officer for NorthStar Financial.

The NorthStar Tech Revolution Index employs an Equal Weight approach and selects the 30 stocks that score the highest for a combination of adherence to the theme of technological revolution and their revenue generated from these technologically revolutionary business segments, from the Syntax U.S. 3000 Equal Weighted Index and are segmented into the following groups:

Robotics, High Performance Computing & Artificial Intelligence, Internet, Cybersecurity, Cryptocurrency & Blockchain, Banking, Insurance, Investment Technology, 5G enabling Technology & Telecommunications.

The NorthStar Tech Revolution Index sources the Market Share Score from Syntax, a financial data and technology company based in New York. The Syntax Market Share Scores are based on Syntax's proprietary Functional Information System (FIS)® data, which evaluates companies by the characteristics (typically revenues) of their various product lines. Syntax allows us to identify, classify and analyze financial data better than ever before. Using its patented technology inspired by systems sciences, Syntax offers the most comprehensive, granular and

accurate product line revenue data available on the market. Syntax Direct operates one of the most sophisticated development platforms available and allows us to create indices that precisely match our criteria.

For more information about the Syntax Market Share Scoring Methodology, please visit: www.syntaxdata.com/.

For more information about the new NorthStar Tech Revolution Index please visit: [NorthStar Tech Revolution Index \(northstar65.com\)](http://NorthStar Tech Revolution Index (northstar65.com))

Disclosures

Investment advisory services offered through Delta Investment Management, LLC, an SEC registered Investment Advisor. The index launch date was May 7, 2024. All information for an index prior to its launch date is hypothetical back-tested, not actual performance, based on the index methodology in effect on the launch date. Back-tested performance reflects application of an index methodology and selection of index constituents with the benefit of hindsight and knowledge of factors that may have positively affected its performance, cannot account for all financial risk that may affect results and may be considered to reflect survivor/look ahead bias. Actual returns may differ significantly from, and be lower than, back-tested returns. Past performance is not an indication or guarantee of future results. This back-tested data may have been created using a "Backward Data Assumption".