

# Eventide Strategic Growth Strategy

Q1 2026 Presentation

# About Us

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**BUSINESS 360** 

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**Founded in 2008**

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**Headquartered in Boston, MA**

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**14 strategies across active and systematic mutual funds, ETFs, and SMAs**

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**Proprietary Business 360<sup>®</sup> research framework**

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**\$7.3B in net assets under management<sup>1</sup>**

1. As of 12/31/2025, excludes Eventide Ventures products.

# Eventide Strategic Growth Strategy

## Objective

Seeks to provide long-term capital appreciation.

## About the Strategy

A diversified strategy representing our "best ideas" for long-term capital appreciation. Historical emphases in small- and mid-cap growth, Healthcare and Information Technology.

## Benchmarks

**Bloomberg US Mid Cap Growth Index**

## Morningstar Category

**US Fund Mid-Cap Growth**

## Lipper Category

**Mid-Cap Growth**

Investors should consider the Strategic Growth Strategy's investment objectives, risks, charges, and expenses carefully before investing or sending money. Investors should also carefully review a current copy of Eventide's Brochure for an additional disclosure of Eventide's investment strategies, approach, and relevant risks, as updated from time to time. For more information, please contact Eventide at 1-877-771-EVEN (3836).

The Adviser's judgment about the quality and intrinsic value of companies may prove to be incorrect. All investments involve risk. There is no guarantee that any investment will achieve its objectives, generate positive gains, or avoid losses. The Bloomberg US Mid Cap Growth Index is a float market-cap-weighted index based on an equal-weighted combination of four factors: earnings yield, valuation, dividend yield, and growth. The constituents consist of the lower 800 in capitalization of the Bloomberg 1000 Index, which is a float market cap-weighted benchmark of the 1000 most highly capitalized US companies. Investors cannot directly invest in an index, and unmanaged index returns do not reflect any fees, expenses, or sales charges. The volatility of an index may be materially different than that of the Strategy, and investors should not expect the Strategy to achieve the same results as a listed index. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risk, including the possible loss of principal.

# Strategy Distinctives

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## Healthcare Leadership

Our team's credentials include an MD, multiple PhDs, and other experts. This offers a distinct edge and warrants high concentration in the industry.

## Less-Correlated Source of Return

The portfolio is constructed with goals of high internal diversification and low market correlation.

## Extended Time Horizon

Our established portfolio management team has the freedom to adopt a long-term view, which decreases liquidity costs and avoids forced selling on the back of volatility.

## Moral Discernment

We seek to invest in companies with good products and good practices, striving to earn an under-appreciated source of alpha.

There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risks, including the possible loss of principal.

# Portfolio Management

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**Finny Kuruvilla, MD, PhD**  
Co-Chief Investment Officer,  
Senior Portfolio Manager

## ROLE

Finny Kuruvilla, MD, PhD, serves as Co-Chief Investment Officer and Senior Portfolio Manager for Eventide. He serves as the Lead Portfolio Manager for Eventide's Strategic Growth, Healthcare & Life Sciences, and Technology Strategies. He also is a Managing Director for Eventide Ventures, as well as a Founding Member of Eventide.

## BACKGROUND

- Principal role at Clarus Ventures
- Postdoctoral research: information metrics, statistics, Mahalanobis distance, pseudo-Bayesian expectation-maximization, likelihood ratio-based computation, cluster analytics on massive data sets
- MD and PhD from Harvard Medical School
- MS in Electrical Engineering and Computer Science from MIT
- BS in Chemistry from Caltech

# Investment Team



**Finny Kuruvilla, MD, PhD**  
Co-CIO, Senior  
Portfolio Manager



**Dolores Bamford, CFA**  
Co-CIO, Senior  
Portfolio  
Manager



**Chris Grogan, CFA**  
Portfolio Manager,  
Director of Asset  
Allocation  
Services



**I-hung Shih, PhD**  
Portfolio  
Manager,  
Managing  
Director



**Andrew Singer, CFA**  
Portfolio  
Manager, Senior  
Research  
Analyst



**Tyler Frugia**  
Portfolio  
Manager, Head  
of Portfolio  
Analytics



**Westley Dupray, CFA**  
Senior Research  
Analyst,  
Principal



**Bert Kinsey, PhD, PharmD**  
Research  
Analyst,  
Principal



**Drew Biedermann, PhD**  
Research  
Analyst, Senior  
Associate



**Faina Rozental-Behrer**  
Associate Portfolio  
Manager, Senior  
Research Analyst



**Darric White**  
Portfolio  
Manager, Senior  
Research  
Analyst



**Reginald Smith**  
Associate Portfolio  
Manager, Senior  
Research Analyst



**Nicholas Leibold, CFA**  
Senior Research  
Analyst



**Claudia Kwan**  
Research  
Analyst



**Alexandra Cobourn**  
Research Analyst



**Adam Golpavar**  
Associate  
Research  
Analyst



**Colin Delaney**  
Head of Trading,  
Portfolio  
Specialist



**Conor Kelly**  
Trader

As of 12/31/2025

# Business 360<sup>®</sup> Research Team

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**Tyler Frugia**  
Portfolio Manager,  
Head of Portfolio  
Analytics



**Brock Treworgy,**  
**CAMS, CFE**  
Business 360  
Research Manager



**Abel Ballew**  
Business 360  
Manager



**Jaime Joshua**  
Business 360  
Research Analyst

As of 12/31/2025.

# Specialized Healthcare Team

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**Finny Kuruvilla,  
MD, PhD**  
Co-CIO, Senior  
Portfolio Manager



**I-hung Shih,  
PhD**  
Portfolio Manager,  
Managing Director



**Bert Kinsey,  
PhD, PharmD**  
Research  
Analyst,  
Principal



**Westley Dupray,  
CFA**  
Senior Research  
Analyst,  
Principal



**Drew  
Biedermann,  
PhD**  
Research  
Analyst, Senior  
Associate

As of 12/31/2025.

# Investment Philosophy

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We believe **high-quality companies** that excel at **creating value for others** and **trade at a discount to intrinsic value** offer superior long-term risk-adjusted returns.

The Adviser's judgment about the quality and intrinsic value of companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive gains, or avoid losses. As we evaluate individual companies, we start with a qualitative analysis. We seek to invest in companies that we deem to be "high-quality".

# Investment Process

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# Investment Process

## BUSINESS 360<sup>®</sup>

### IDEA GENERATION

First, understand the big picture of industries. Use consultants and industry experts. Identify secular themes and companies best positioned for participation.

### QUALITATIVE ANALYSIS

Look for high quality companies through assessment of competitive advantages, management teams, and attractiveness of industries.

### FINANCIAL ANALYSIS

Seek companies with long-term financial strength by analyzing historical financial performance and modeling future financial performance. Look for those with the most attractive upside potential and highest long-term probability of gain vs. loss.

### PORTFOLIO CONSTRUCTION

Build portfolio with goals of high internal diversification and low market correlation.

### MACRO POSITIONING

Position portfolio with macro views (leading economic indicators, valuation, sentiment).

### EVENTIDE STRATEGIC GROWTH STRATEGY

Continue to monitor investment case. Adjust estimates and price targets to reflect changes in the fundamentals.

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## Our Research Framework: Business 360®

Our **proprietary framework** for evaluating both a company's **long-term competitive advantage** and its impact on **human flourishing** by analyzing its **operations and strategy** through the lens of **key stakeholders**.

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# Eventide's Distinct Investment Approach



Our approach includes the integration of two core components:

- 1** Investment Excellence
- 2** Moral Discernment

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# Two Hallmarks of Business 360® Companies



**Good Products**  
What a company makes



**Good Practices**  
How a company operates

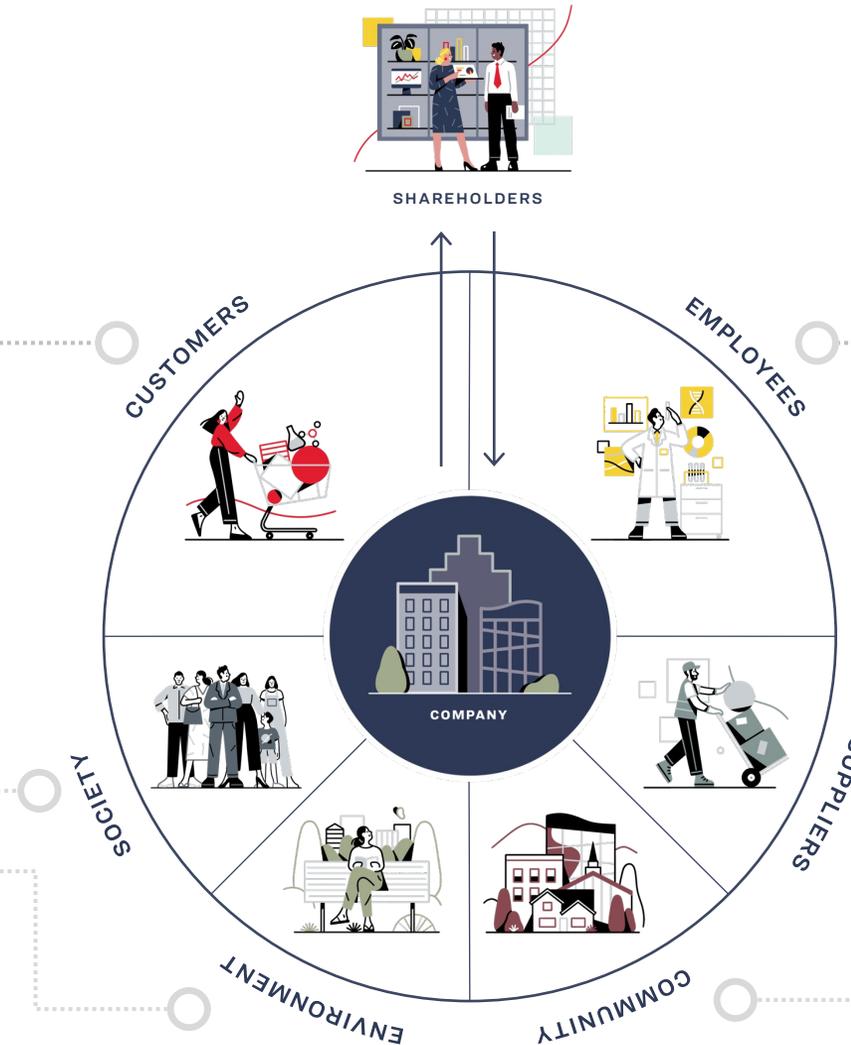
The above expresses the views of the Adviser and such views may not prove accurate.

# Good Practices

*Delight their  
CUSTOMERS*

*Add value to  
SOCIETY*

*Care for and preserve  
the ENVIRONMENT*



*Treat EMPLOYEES as  
valued assets*

*Value SUPPLIERS as  
strategic partners*

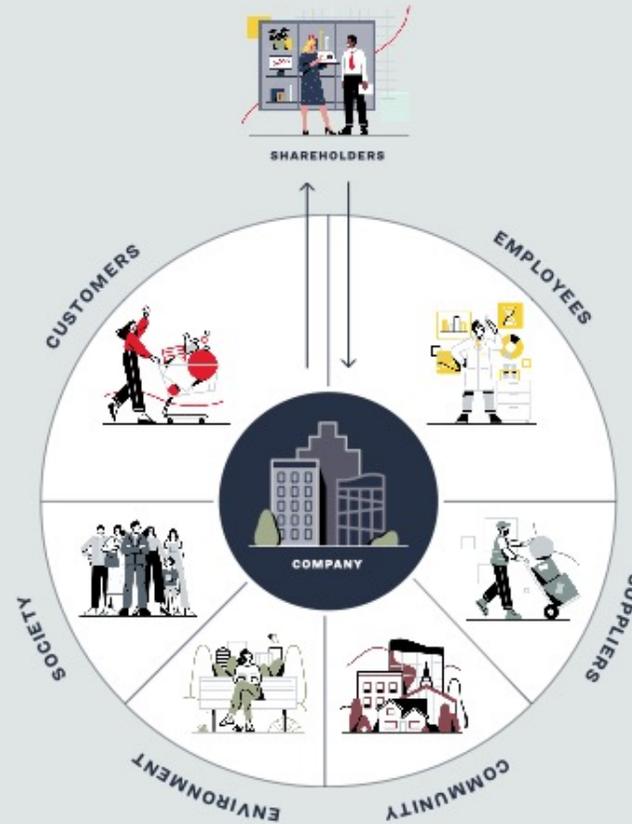
*Invest in local  
COMMUNITIES*

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# We believe what's right...

Companies that place a premium on:

- Customer satisfaction
- Employee morale
- Supplier partnership
- Societal impact
- Environmental stewardship



# ...is also smart.

Tend to have:

- Higher customer loyalty
- Higher productivity
- Resilient supply chains
- Stronger brands
- Sustainable productive yield

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# Idea Generation

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## Assess Industry-Level Opportunities

- Understand the big picture of industries
- Discern attractive long-term secular investment trends

## Build Investment Case with Research and Expertise

- Leverage consultants, industry experts, and Key Opinion Leaders
- Review industry specific reports, trends, and third-party research

## Drill Down on Companies of Interest

- Study competitors, suppliers, and customers of existing holdings
- Identify companies we believe are best positioned for participation

The Adviser's judgment about industries, secular trends, and particular companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses. We refer to long-term secular investment trends as those that tend to be persistent through market conditions.

# Qualitative Analysis

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## Attractive Industries

- High barriers to entry, strong bargaining power, and low threat of substitutes
  - Above-average growth rate and large Total Addressable Market (TAM)

## Sustainable Competitive Advantages

- Proprietary assets, healthy culture, economies of scale, new innovations, and strong business models
  - Pricing power, wide moat, and growing market share

## Exemplary Management Teams

- Integrity, candor, and transparency
- Focus on long-term value creation, strategy, and wise capital allocation
  - Resiliency and agility in a changing environment and the ability to succeed over the long term

The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

# Financial Analysis

- QUALITIES:**
- ✓ Attractive TAM
  - ✓ Strong terminal margin profile
  - ✓ Strong unit economics
  - ✓ High Return on Invested Capital (ROIC)
  - ✓ Revenue and earnings growth that is consistent and repeatable
  - ✓ Strong balance sheet
  - ✓ Strong future free cash flow prospects

- Analyze historical financial performance, adjusted for relevant industry metrics

- Model future financial performance:

**3-YEAR FORECAST:**

- Income Statement
- Balance Sheet
- Cash Flow Statement

**5-TO 10-YEAR FORECAST:**

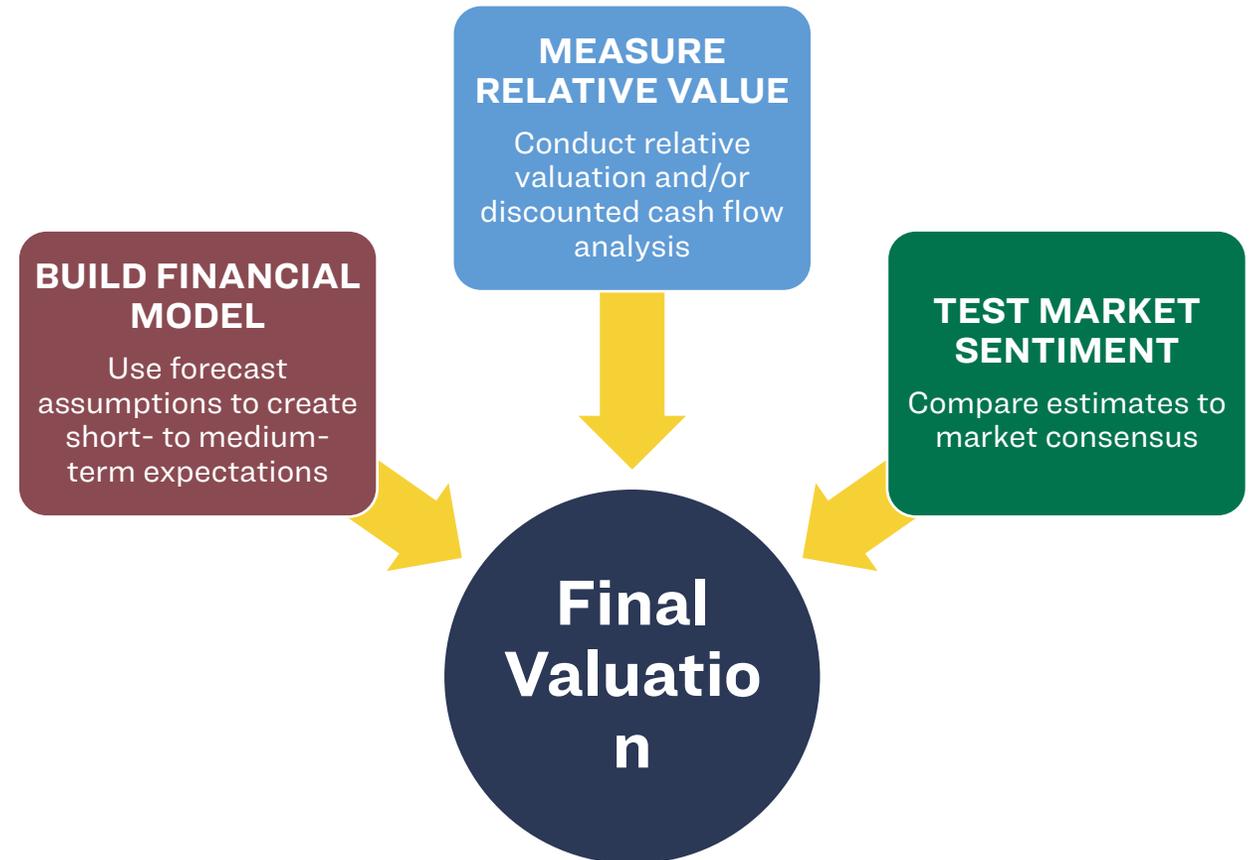
- Earnings Power
- Free Cash Flow

- Compare our estimates with market consensus to assess opportunity

The Adviser's analysis may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

# Financial Analysis

- Build valuation from financial modeling, relative valuation, and market consensus to assess opportunity
- Seek to identify companies with the most attractive upside potential and highest long-term probability of gain vs. loss



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# Investment Process

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- **Quantitative and qualitative research** from **strategic research partners** offers robust insights into **positioning** and **risk analysis**
- Our **innovative in-house platform** integrates this crucial data into an **exclusive, tailored dashboard** to provide **risk management and guardrails**
- Internal processes **minimize volatility**, maintain **position- and portfolio-level risk management**, and support our **core investment philosophy**

There is no guarantee that the Adviser's views will be accurate or come to pass. All investments involve risk, including the possible loss of principal.

# Portfolio Construction



## High Conviction Approach

We build portfolios with **high-conviction names** where we have distinct expertise (e.g., healthcare), prioritizing risk management through internal diversification and low market correlation.

## Risk Management

In our investment process, we seek to **reduce volatility** by **adjusting beta** in accordance with our **macroeconomic outlook** and implementing targeted positioning.

## Private Investment

The portfolio has an allocation to **high-impact offerings**, such as life-changing micro loans or private investments.

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# Best Ideas: Focus on Healthcare

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## Equipped for savvy investment decision-making

- Our team of **healthcare experts** has earned multiple degrees (MD, PhD, PharmD, CFA) and is deeply experienced in research

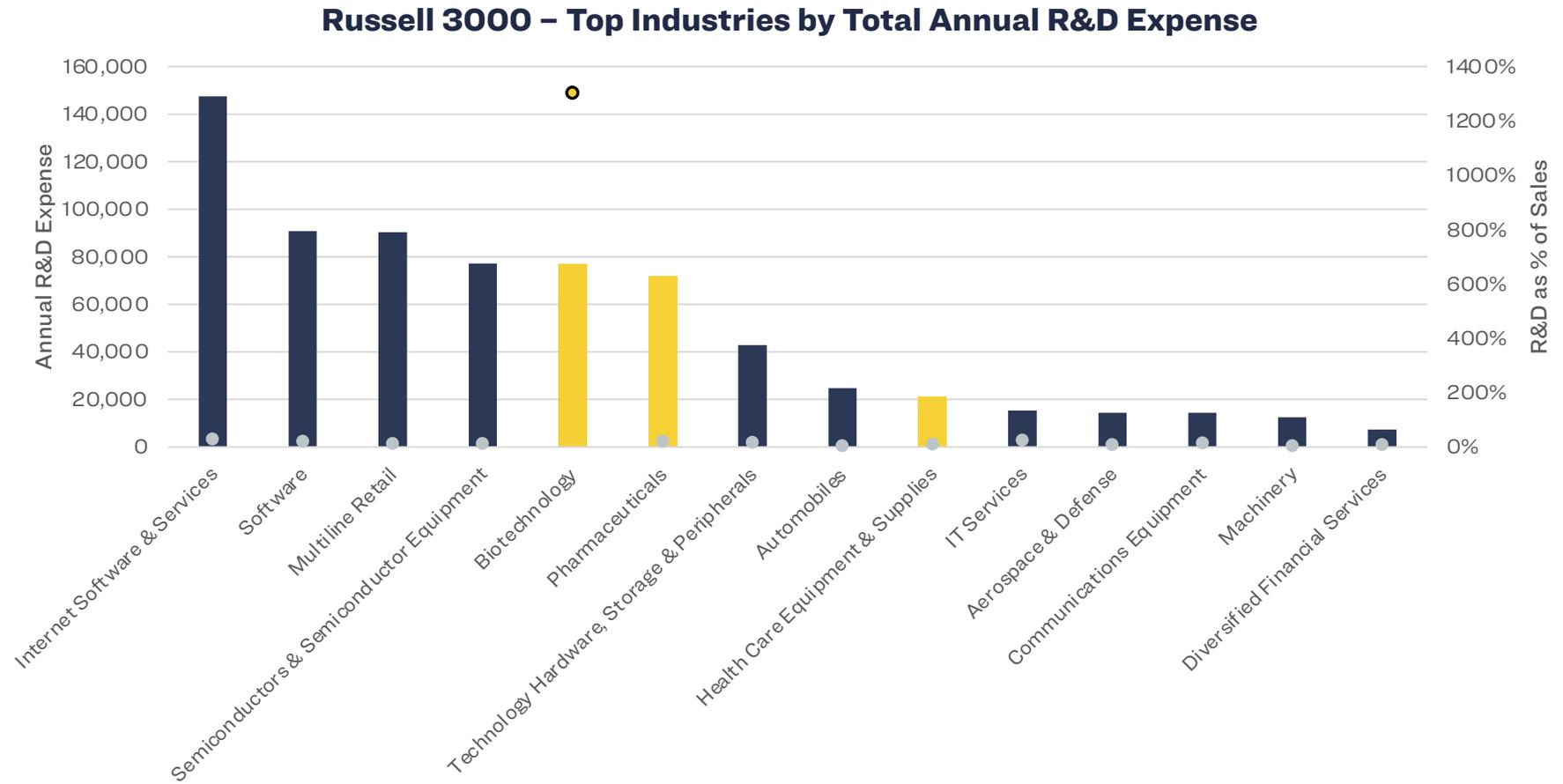
## Compelled to seek life-changing innovations

- Look for **undiscovered companies** with **compelling data** (e.g., differentiated efficacy) from a well-controlled clinical trial or a validated, translatable animal model
- Target **large unmet medical needs** through companies which we believe are **worth significantly more** than current valuation (i.e.,  $\geq 100\%$ )
- Seek **well-capitalized** businesses with **clean capital structures** and **strong management teams**

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# Why Healthcare Expertise Matters

Spend on research and development (R&D) is very high particularly in biotech relative to business size. Analyzing R&D is critical for valuing biotech and other healthcare companies.



Source: FactSet.; data as of 3/31/2025. See disclosures for important information related to indices.

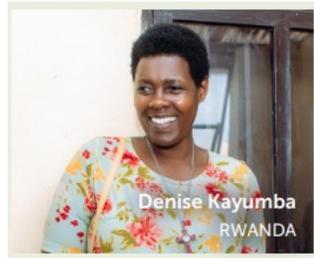
# Private Investment: the Economic Empowerment Initiative

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- Invest in **business solutions** to address key points in the **journey out of poverty**
- Reach **underserved populations** with **high drive to achieve** and **low access to funds**
  - Loans serve entrepreneurs and businesses founded in some of the **world's poorest regions**
  - **70%** of loans with Eventide's largest investment within the initiative go to **female business owners**
- Loan rates are generally **similar to BB Corporate** rates

As of 12/31/25. Investment allocations are subject to change. Access to the private investment sleeve is only available in the Fund, not SMAs. Vision Fund FY2024 Report.

# Private Investment: the Economic Empowerment Initiative



Denise Kayumba  
RWANDA

Denise Kayumba was sick with meningitis as a child and lost her eyesight as a result. Determined to support herself, she learned to weave and knit to earn an income. Denise desired to teach others like her, but lacked the resources. Then she learned about Urwego.

She joined a group with others who are blind and used a loan to purchase materials for her shop. With these resources, **she is training 10 individuals who are blind in weaving and knitting so they can start their own businesses.**



The *Icyerecyezo* ("Direction") loan group  
URWEGO FINANCE | RWANDA

Access to the private investment sleeve is only available in the Fund, not SMAs. Investment allocations are subject to change. Hope Global Investments, Investment Report Prepared for Eventide Asset Management, Q1 2025

# Private Investment: the Economic Empowerment Initiative

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## VisionFund Borrows \$37M for Financial Inclusion Goals

LONDON, December 9, 2021. VisionFund International, the Christian, mission-focused microfinance subsidiary of World Vision, announced that it has successfully issued its first notes from Eventide Asset Management, LLC, a leader in values-based investing, investing that makes the world rejoice. VisionFund expects to issue up to USD \$37 million of notes from Eventide.

VisionFund's strategic ambition is to support 10 million clients and impact 30 million children's lives by 2030. Through the partnership with Eventide, VisionFund will provide financial solutions to more vulnerable small business owners living in rural areas where VisionFund operates. Access to a small loan to grow a business leads to child and family well-being, and also brings hope and dignity to our clients.

With the Eventide notes, VisionFund will also expand their recovery lending to those affected by COVID-19, to help clients build back their businesses and livelihoods. The notes will also have a direct impact with our clients through other various channels such as water, sanitation and hygiene (WASH) and savings group lending. This is aligned with Eventide's purpose and value of honouring God and serving its clients by investing in companies that create compelling value for the global common good.

Access to the private investment sleeve is only available in the Fund, not SMAs. Investment allocations are subject to change. <https://www.visionfund.org/newsroom/visionfund-borrows-37m-financial-inclusion-goals>

# Portfolio Construction

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- Construct portfolio with goals of **high internal diversification** and **low market correlation**
- Actively target **relative position sizes** (typically ranging from 1-5%) for optimal risk/reward both at the security- and portfolio-level
- Portfolio made up of approximately **60–75 companies**
- Utilize **systematic risk management guardrails** to maintain risk levels

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# Macro Positioning

- Establish macro views by **synthesizing three key data streams:**
  - Economic indicators
  - Valuation
  - Sentiment
- **Position portfolio using cash and other tools** to allow stock selection on fundamental grounds to mesh with our macro views at the portfolio level



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# Business 360<sup>®</sup> Process Integration

## BUSINESS 360<sup>®</sup>

### IDEA GENERATION

Consider how secular trends mesh with human needs and whether a company's good is truly good or service truly serves.

### QUALITATIVE ANALYSIS

Assess leadership's integrity, support for innovation, culture-setting, and ability to adapt and succeed.

### FINANCIAL ANALYSIS

Look for key metrics that illustrate management's commitment to the six stakeholders, such as gross retention rate. Adjust valuation for the "fourth source of alpha."

### PORTFOLIO CONSTRUCTION

Build a portfolio typically overweighted to Business 360<sup>®</sup> leaders.

### MACRO POSITIONING

Practice excellence and wise risk management as responsible stewards of client capital.

### EVENTIDE STRATEGIC GROWTH STRATEGY

Continue to monitor the Business 360<sup>®</sup> investment case across the portfolio. Embrace and engage with portfolio companies to promote good practices and products.

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# Investment Ideals

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We seek investment opportunities that reflect these ideals:

- ✓ **We believe in respecting the life and dignity of all people.** This means we invest in areas that honor life, like treatments seeking to address challenging diseases. This also means we seek to avoid profiting from anything designed to harm or exploit a life including abortion services, weaponry, and tobacco.
- ✓ **We believe in preserving justice and peace.** This means we look to invest in companies that are governed by strong ethics and take extra precautions when considering companies with ties to countries where we have concerns about human rights abuses.
- ✓ **We believe in the importance of family and community.** This means we look to serve marginalized communities and people. This also means we don't invest in harmful or addictive products or services such as violent entertainment or pornography.
- ✓ **We believe in responsible management practices.** This means we look to invest in companies with leadership teams that treat their employees, customers, and other stakeholders fairly. This also means we don't invest in companies with a concerning record of mistreatment, litigation, or regulatory actions.
- ✓ **We believe in environmental stewardship.** This means we look to invest in companies supporting the expansion to cleaner, more efficient sources of energy and companies leading in their industries toward better stewardship practices. This also means we don't invest in companies with a concerning record of environmental fines or abuse.

The Strategy's ethical values screening criteria could cause it to underperform similar strategies that do not have such screening criteria. This could be due to ethically acceptable companies falling out of favor with investors or failing to perform as well as companies that do not meet the Strategy's ethical screening guidelines. The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

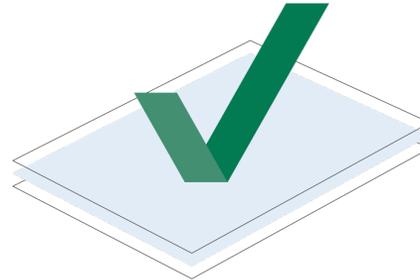
# Values-Based Analysis

There are three dimensions to our values-based approach to investing:



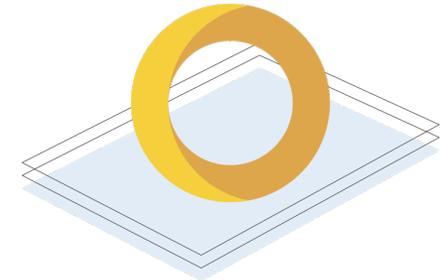
## AVOID

Create an investable universe of companies and securities that pass our screens, grounded in our values.



## EMBRACE

Conduct original Business 360<sup>®</sup> research to find high quality opportunities contributing to human flourishing through value creation for key stakeholders.



## ENGAGE

Engage portfolio companies or security issuers on our Business 360<sup>®</sup> values to advocate for positive change.

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# PRODUCT SOLUTIONS

All strategies denoted in blue are also available as SMAs



LOWER EXPECTED RETURNS & VOLATILITY | HIGHER EXPECTED RETURNS & VOLATILITY

| Strategy Vehicle |  | Fixed Income | Allocation   | Value   | Core   | Growth   | Sector   |
|------------------|--|--------------|--|---|--|--|--|
|                  |  | Mutual Funds | <p><b>Limited-Term Bond</b><br/><i>US Fund Short-Term Bond</i></p> <p><b>Core Bond</b><br/><i>US Fund Intermediate Core Bond</i></p> | <p><b>Balanced</b><br/><i>US Fund Moderate Allocation</i></p>   |  | <p><b>Dividend Growth</b><br/><i>US Fund Mid-Cap Blend</i></p> <p><b>Large Cap Core</b><br/><i>US Fund Large Blend</i></p> | <p><b>Strategic Growth</b><br/><i>US Fund Mid-Cap Growth</i></p> |
| ETFs             |  |              | <p><b>Dividend Value</b><br/><i>US Fund Large Value</i></p> <p><b>Large Cap Value</b><br/><i>US Fund Large Value</i></p>             | <p><b>US Equity Market</b><br/><i>US Fund Large Blend</i></p> <p><b>Small Cap</b><br/><i>US Fund Small Blend</i></p> <p><b>International<sup>1</sup></b><br/><i>Foreign Large Blend</i></p> | <p><b>Large Cap Growth</b><br/><i>US Fund Large Growth</i></p> |  |  |

<sup>1</sup>The associated SMA is ADR-only, and therefore may differ meaningfully from the ETF.

# Sales Team

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**Michael Schnackenberg**  
Head of Distribution



**Jacob Seif, CIMA®, CFP®**  
Director of Advisor Sales



**Mark Wambolt**  
Head of Strategic Partnerships



**Greg Gunter**  
Senior Regional Director, Southeast Region



**Lans Slack**  
Senior Regional Director, Mid-Atlantic Region



**Colby Smidt**  
Regional Director, Mountain States and Pacific Northwest



**Spencer Martin**  
Regional Director, Midwest Region



**Ann-Marie Keltner**  
Regional Director, New England Region



**Clay Henderson**  
Regional Director, West Coast Region



**Ally Espinosa**  
Director of Key Accounts



**Matt McEathron**  
Regional Director, Institutional Sales



**Shelby Keim**  
Advisor Service Associate



**Tytus Moen**  
Advisor Service Associate

As of 01/20/2025.

# Investment Consulting Group

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**Chris Grogan,**  
**CFA**  
Portfolio  
Manager,  
Director of Asset  
Allocation  
Services



**Fred Ge, CFA**  
Senior Portfolio  
Consultant



**Robert Carney**  
Senior Manager,  
Institutional  
Services

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As of 12/31/2025.

# Important Information

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This communication is provided for informational purposes only and expresses views of Eventide Asset Management, LLC (“Eventide”), an investment adviser, and is not intended for further distribution. This does not constitute investment advice nor is it a recommendation or offer to purchase or sell or a solicitation to deal in any security or financial product. Eventide does not provide tax, accounting, or legal advice. Eventide’s values-based approach to investing may not produce desired results and could result in underperformance compared with other investments. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

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Eventide uses the trademark “Investing that makes the world rejoice<sup>®</sup>” in a figurative manner to help explain its focus on serving investors by helping them improve the world.

The Russell 3000 Index is composed of 3000 large U.S. companies, as determined by market capitalization. This portfolio of securities represents approximately 98% of the investable U.S. equity market. The Russell 3000 Index is comprised of stocks within the Russell 1000 and the Russell 2000 Indices. The Russell 3000 Dividend Growth Index tracks the performance of U.S. companies within the Russell 3000 Index that have consistently increased their dividend payments over ten or more years.



**INVESTING THAT MAKES  
THE WORLD REJOICE.®**

**Eventide Asset Management, LLC | One International Place, Ste. 4210 | Boston, MA 02110 | 877-771-EVEN (3836)**