|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Runde & Co. LLC** Core Strategy Investment Returns through December 31, 2024 |  |  |  |
|  | **2024** | **2023 2022 2021 2020 2019** | **2018** | **2017** | **2016** |
| **Runde Large-Cap Core (Gross)** | **+26.1%** | **+28.9% (19.4)% +28.4% +14.3% +28.7%** | **(8.1)%** | **+22.4%** | **+12.6%** |
| **Runde Large-Cap Core (Net)** (Inception: 9/30/2003) | **+25.1** | **+27.8 (20.1) +26.5 +13.2 +27.6** | **(8.9)** | **+21.4** | **+11.6** |
|  Ishares Top 1000 ETF | +24.5 | +26.5 (19.1) +26.5 +21.0 +31.4 | (4.8) | +21.7 | +12.1 |
|  Dow Jones Industrial Average | +15.0 | +17.9 (6.9) +21.0 +9.7 +25.3 | (3.5) | +28.1 | +16.5 |

Performance is in compliance with the Global Investment Performance Standards (GIPS).