

Dauble+Worthington   Individual Model Annual Performance Ranking (Best → Worst)													Red = S&P 500 Benchmark		* 2026 = Jan–Mar partial year								
'03	'04	'05	'06	'07	'08	'09	'10	'11	'12	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25	'26*
Idx Rot +51.5%	LST +21.2%	Sec Opp +16.8%	ROW 2.0 +28.4%	ROW 2.0 +36.0%	ROW 2.0 +206.7%	ROW 2.0 +89.8%	ROW 2.0 +42.1%	LST +43.3%	Lrg Cap +29.7%	Idx Rot +61.4%	LST +26.5%	Lrg Cap +17.7%	Sector Rt +23.4%	Sector Rt +36.2%	Lrg Cap +0.2%	Idx Rot +36.8%	Lrg Cap +96.2%	Idx Rot +33.6%	LST +11.7%	Lrg Cap +33.0%	Lrg Cap +70.4%	Sector Rt +33.4%	Sec Opp +23.6%
Sector Rt +31.2%	Lrg Cap +18.7%	Lrg Cap +9.6%	S&P 500 +15.8%	Sector Rt +22.9%	Dynamic +75.9%	Idx Rot +57.3%	Dynamic +29.9%	Dynamic +15.7%	ROW 2.0 +20.9%	Sector Rt +56.8%	Idx Rot +16.6%	LST +9.1%	LST +20.8%	Idx Rot +35.8%	LST -2.0%	S&P 500 +31.5%	Sec Opp +59.5%	S&P 500 +28.7%	Sec Opp -3.2%	Idx Rot +28.2%	ROW 2.0 +26.6%	Lrg Cap +23.5%	Sector Rt +8.7%
S&P 500 +28.7%	Sec Opp +16.0%	Sector Rt +9.3%	Dynamic +13.9%	LST +22.0%	LST +41.4%	Lrg Cap +51.0%	Idx Rot +23.7%	ROW 2.0 +14.9%	S&P 500 +16.9%	Sec Opp +38.3%	S&P 500 +13.7%	Dynamic +1.5%	Idx Rot +17.1%	ROW 2.0 +30.0%	S&P 500 -4.4%	Sector Rt +30.3%	Idx Rot +56.7%	Lrg Cap +20.4%	Dynamic -3.4%	S&P 500 +26.3%	S&P 500 +25.0%	S&P 500 +17.9%	S&P 500 +5.7%
Dynamic +15.1%	ROW 2.0 +14.3%	Dynamic +9.3%	Idx Rot +11.7%	Dynamic +21.0%	Lrg Cap +9.2%	Sec Opp +48.9%	Sector Rt +20.5%	S&P 500 +1.3%	Idx Rot +12.5%	S&P 500 +32.4%	Lrg Cap +12.5%	S&P 500 +1.4%	Sec Opp +9.8%	Lrg Cap +26.3%	Dynamic -5.5%	Sec Opp +24.9%	S&P 500 +18.4%	Sector Rt +16.0%	Sector Rt -5.2%	Sector Rt +1.1%	Sec Opp +17.4%	Idx Rot +12.8%	Idx Rot +1.4%
Sec Opp +15.0%	S&P 500 +10.9%	ROW 2.0 +6.9%	Lrg Cap +4.6%	Sec Opp +16.7%	Sector Rt -4.0%	Sector Rt +47.1%	Sec Opp +19.7%	Idx Rot -8.4%	Sec Opp +11.6%	Lrg Cap +31.5%	Dynamic +11.8%	Idx Rot -3.6%	S&P 500 +9.8%	S&P 500 +24.2%	Sector Rt -9.0%	Lrg Cap +21.2%	Sector Rt +17.8%	ROW 2.0 +8.6%	ROW 2.0 -10.5%	ROW 2.0 +1.0%	Idx Rot +12.6%	Sec Opp +6.7%	Lrg Cap +1.0%
ROW 2.0 +12.6%	Idx Rot +8.4%	S&P 500 +4.9%	Sector Rt +4.6%	Lrg Cap +11.5%	Sec Opp -11.7%	Dynamic +42.2%	Lrg Cap +19.2%	Sec Opp -9.8%	Sector Rt +10.4%	Dynamic +16.9%	Sector Rt +9.2%	Sector Rt -4.8%	Dynamic +9.5%	Dynamic +24.0%	ROW 2.0 -10.9%	Dynamic +15.4%	Dynamic -9.7%	Dynamic +7.6%	S&P 500 -18.1%	Sec Opp -0.4%	Dynamic +11.4%	Dynamic -0.0%	Dynamic +0.1%
Lrg Cap +10.0%	Dynamic +6.1%	LST +3.8%	LST +2.6%	S&P 500 +5.5%	S&P 500 -37.0%	S&P 500 +26.5%	LST +18.4%	Lrg Cap -12.6%	Dynamic +7.8%	ROW 2.0 +9.4%	Sec Opp +4.7%	Sec Opp -6.7%	Lrg Cap +9.2%	Sec Opp +23.4%	Sec Opp -11.6%	LST +13.8%	LST -14.5%	Sec Opp +3.7%	Lrg Cap -21.9%	Dynamic -3.1%	Sector Rt +4.6%	ROW 2.0 -11.7%	LST -0.7%
LST -4.2%	Sector Rt +2.8%	Idx Rot +0.5%	Sec Opp +1.0%	Idx Rot +2.1%	Idx Rot -52.4%	LST -32.8%	S&P 500 +15.1%	Sector Rt -18.2%	LST -3.6%	LST -3.8%	ROW 2.0 +2.4%	ROW 2.0 -11.2%	ROW 2.0 -6.3%	LST -8.5%	Idx Rot -12.8%	ROW 2.0 +5.5%	ROW 2.0 -35.9%	LST -6.1%	Idx Rot -32.8%	LST -7.3%	LST -14.6%	LST -15.9%	ROW 2.0 -3.2%

Model	Full Name	CAGR*	YTD 2026*	Best Year	Worst Year	2025	2024	2023	2022	2021
Lrg Cap	Large Cap Opp	+18.9%	+1.0%	+21.6%	-14.4%	+23.5%	+70.4%	+33.0%	-21.9%	+20.4%
ROW 2.0	ROW 2.0	+14.0%	-3.2%	+91.3%	-34.6%	-11.7%	+26.6%	+1.0%	-10.5%	+8.6%
Sector Rt	Sector Rotation	+13.4%	+8.7%	+16.6%	-18.6%	+33.4%	+4.6%	+1.1%	-5.2%	+16.0%
Dynamic	Dynamic	+12.3%	+0.1%	+39.0%	-13.3%	-0.0%	+11.4%	-3.1%	-3.4%	+7.6%
Sec Opp	Sector Opp	+12.2%	+23.6%	+19.2%	-14.3%	+6.7%	+17.4%	-0.4%	-3.2%	+3.7%
Idx Rot	Index Rotation	+12.1%	+1.4%	+23.9%	-24.6%	+12.8%	+12.6%	+28.2%	-32.8%	+33.6%
S&P 500	S&P 500 TR	+11.5%	+5.7%	+32.4%	-37.0%	+17.9%	+25.0%	+26.3%	-18.1%	+28.7%
LST	LST	+3.6%	-0.7%	+20.6%	-18.6%	-15.9%	-14.6%	-7.3%	+11.7%	-6.1%

\* CAGR sourced directly from DATA tab (monthly compound formula). Red = S&P 500 benchmark. \* 2026 YTD = Jan–Mar. Please download individual tear sheets for import performance disclosures.

### Dauble+Worthington Equity Portfolios Disclosure Statement

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