

AFM

AFM is an asset management application that relies on mathematics.

Its objective is to outperform the S&P index
.... while minimizing risk exposure.

Outperforming the S&P 500 index through traditional research has become exceedingly challenging, if not impossible.

An alternative approach is warranted.

Instead of targeting high-potential stocks, AFM utilizes a data-driven strategy that operates independently of human intervention.

ATTRIBUTES AND ADVANTAGES OF AFM

1. Non-speculative
2. Data-driven.
3. Minimized human error through automation.
4. Works directly on the investor's account. No unnecessary transfer of funds.
5. Proven track record - Field-tested over 5 years with \$35 million currently under management.
6. Cost effective -
 - no research or analysis,
 - no commissions or added expenses,
 - a single Service Charge covers everything.
7. Diversified portfolio - encompasses a large number of S&P companies thereby ensuring stability.
8. Consistent outperformance - AFM-managed portfolios have outperformed the S&P500 index every year since 2019.

NO

Margin Trading

Short Selling

Futures

Options

High-Frequency
Trading

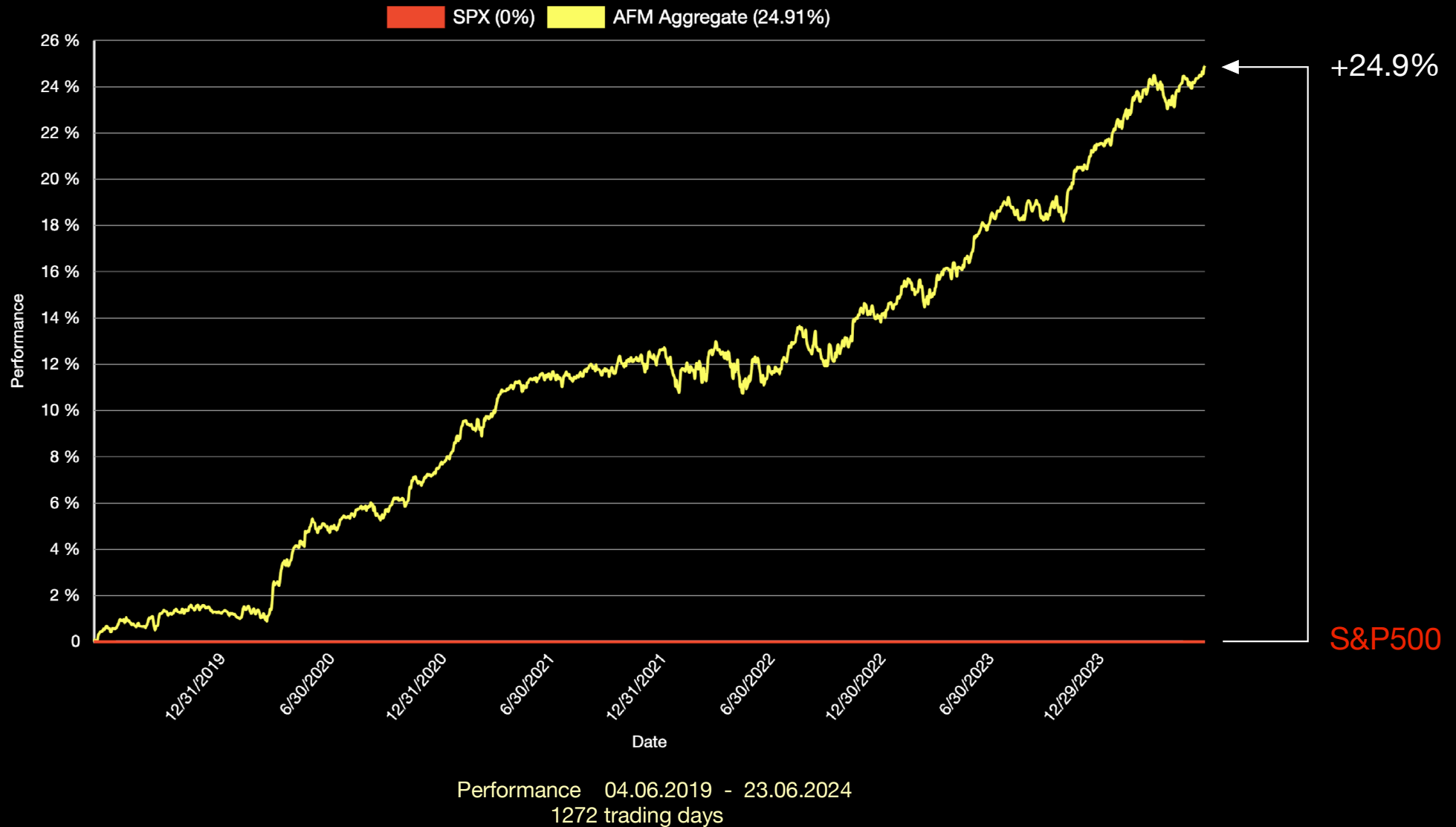
Arbitrage, Derivatives

etc.

How AFM-managed portfolios stack up against the S&P500 index

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RELATIVE PERFORMANCE





Performance 04.06.2019 - 23.06.2024
1272 trading days

Example: A \$10 million AFM-managed portfolio would have outperformed similar funds (see below) by between \$1.59M to \$6.01M in less than 5 years.

Note:

Funds in the table below have been adjusted for dividends and commissions, while AFM-managed portfolios need to deduct an annual 0.5% Service Charge or approximately \$250,000 for a \$10M account over 5 years.

Performance comparisons are relevant, albeit with minor discrepancies.

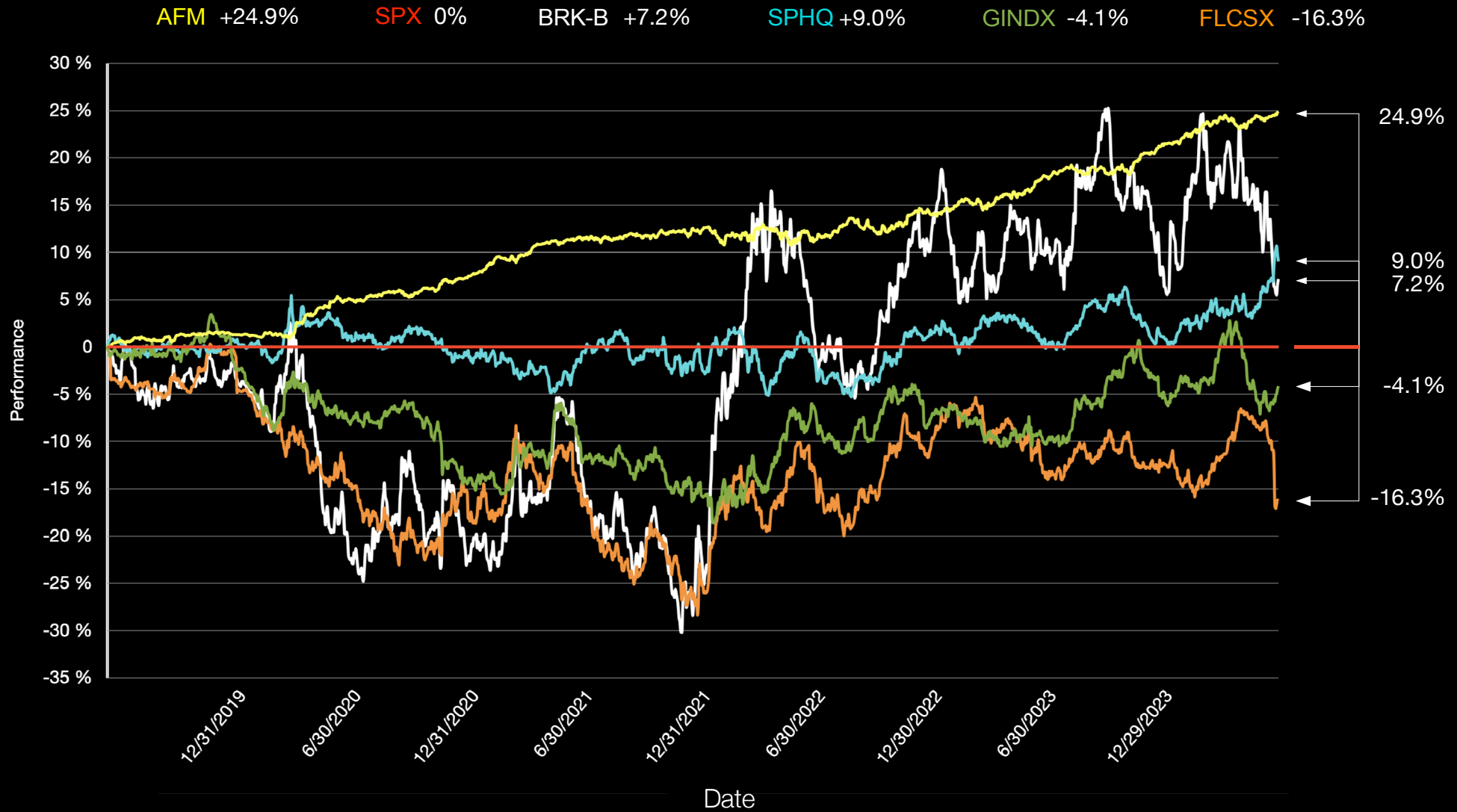
June 03, 2019 - June 21, 2024

		Absolute performance	Relative to S&P500	Performance (\$10M account)	
		%	%	\$	Compared to AFM
AFM		124.0%	24.9%	2'490'000	
S&P500	SPX	99.1%		0	-2'490'000
Large Cap. Funds					
Gotham Index Plus Fund	GINDX	95.0%	-4.1%	-410'000	-2'900'000
Invesco S&P500 Quality ETF	SPHQ	108.1%	9.0%	900'000	-1'590'000
Fidelity Large Cap. Stock Fund	FLCSX	82.8%	-16.3%	-1'630'000	-4'120'000
Berkshire-Hathaway	BRK-B	106.3%	7.2%	720'000	-1'770'000
Enhanced Index Funds					
Fidelity Large Cap Value Index	FLCOX	63.9%	-35.2%	-3'520'000	-6'010'000
Invesco S&P 500 Enhanced Value	SPVU	66.4%	-32.7%	-3'270'000	-5'760'000
Goldman Sachs Active Beta	GSLC	94.6%	-4.5%	-450'000	-2'940'000
JPMorgan Diversified Return U.S. Equity	JPU5	73.1%	-26.0%	-2'600'000	-5'090'000

3a

AFM-managed funds compared to Large Cap. Funds.

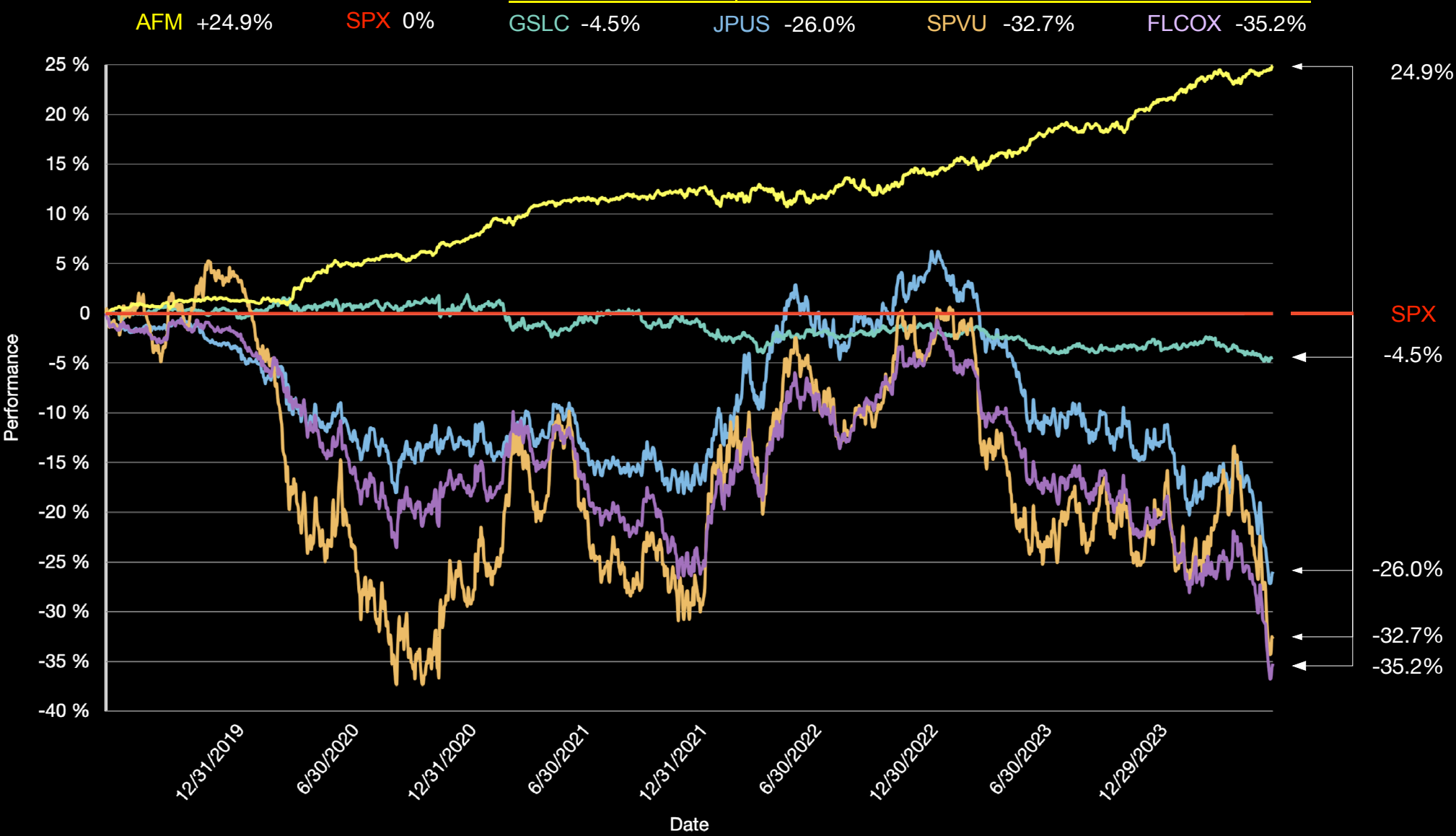
June 04, 2019 - June 21, 2024



3b

AFM-managed funds compared to Enhanced Index Funds.

June 04, 2019 - June 21, 2024



AFM-managed accounts rarely underperform the S&P500 index.

Monthly performance figures

June 2019 - June 2024

Live AFM-managed accounts vs S&P500 Index

J	F	M	A	M	J	J	A	S	O	N	D	
					2019							
					0.4%	0.2%	0.1%	0.4%	0.1%	0.1%	-0.2%	
					2020							
-0.1%	0.2%	1.3%	1.3%	0.9%	-0.4%	0.2%	0.1%	0.1%	0.3%	0.3%	0.2%	5.2%
outperform					2021							
underperform	0.8%	-0.1%	0.4%	0.2%	0.2%	0.1%	-0.2%	0.0%	0.2%	-0.4%	0.0%	2.1%
					2022							
	0.0%	0.2%	0.1%	0.1%	0.3%	0.2%	0.2%	0.2%	0.2%	0.3%	0.5%	1.9%
					2023							
	-0.1%	0.3%	0.0%	0.2%	0.2%	0.3%	0.2%	0.1%	0.1%	0.2%	0.1%	2.1%
					2024							
	0.2%	0.1%	0.0%	-0.1%	0.0%	0.2%						0.4%

Performance figures depend on the base used for their calculation.
Annual performance figures are not the sum of 12 monthly figures, etc.

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LX InfoTech Sàrl stands as the provider of
services to parties using the AFM application.

CLIENT SERVICES

➤ Portfolio setup & launch

1. Account (trading) setup
2. Username & password
3. Familiarisation
4. Portfolio configuration
5. Launch procedure

INHOUSE

➤ Intervention and troubleshooting

➤ Platform maintenance

Reconfiguration subject to evolving S&P500 index.

1. Splits, stock dividends
2. Symbol change
3. Index constituents (mergers, takeovers, delistings)
4. Portfolio sync.

➤ Research

1. Optimize parameters,
2. Reconfigure sub-account setup,
3. Automate procedural tasks.
4. Other markets & areas

Account holder prerogatives & constraints

1. Maintains sole account ownership at all times.
2. Must not interfere with accounts under AFM management.
3. Can however
 - put AFM procedure on hold,
 - sell securities and revert to cash.... using AFM login.

UNDERSTANDING FEES & EXPENSES :

Expenses, which may or may not prevail, should be taken into account when selecting investment opportunities:

- Trading commissions,
- Management fees,
- Front and back-end loads,
- Performance-related benchmark fees, high-water mark clause, etc.
- Stamp duty,
- Custody fees and sales tax.

The cumulative impact of the above **significantly** determines the net return on investment over time.

AFM levies a single Service Charge for portfolio maintenance.
No commissions or added expenses.

Understanding History

The interactive History chart allows investors to assess and compare performance across different **time frames** and against **similar investment types**.

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HISTORY

Account: AllExportPeriod: Last 12 monthsFrom: 5/15/2023To: 5/14/2024Absolute perf. Comparison

Portfolio	Last	Portfolio change		SPX	AFM contribution		AFM p/a extrapolation		Trading days	Start date
	\$	\$	%		%	\$	%	\$		
AFM-Live1	\$ 4,273,559	\$934,426	+28.0%	+26.6%	+1.37%	\$45,946	+1.37%	\$45,746	251	11/20/2020
AFM-Live2	\$ 4,263,785	\$963,467	+29.2%	+26.6%	+2.58%	\$85,315	+2.58%	\$85,148	251	10/3/2019
AFM-Live3	\$ 4,373,430	\$995,482	+29.5%	+26.6%	+2.86%	\$96,673	+2.86%	\$96,609	251	6/4/2019
AFM-Live4	\$ 4,238,065	\$934,109	+28.3%	+26.6%	+1.66%	\$54,988	+1.66%	\$54,846	251	6/4/2019
AFM-Live5	\$ 4,251,149	\$934,954	+28.2%	+26.6%	+1.58%	\$52,577	+1.58%	\$52,396	251	11/20/2020
AFM-Live6	\$ 4,137,540	\$939,756	+29.4%	+26.6%	+2.78%	\$88,886	+2.78%	\$88,898	251	1/29/2021
Total	\$ 25,537,528	\$5,702,194	+28.8%	+26.6%	+2.14%	\$424,385	+2.14%	\$423,644	251	
S&P 500	5,221.42	Note:								

Relative performance of AFM to the S&P 500

