

NorthStar Tech Revolution Index Celebrates One Year Anniversary

Greenville, June 2, 2025: NorthStar Financial, one of the country's leading financial and retirement planning providers, launched 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 had a total return from its inception date on May 29, 2024 to May 29th 2025 of 25.09% (please see disclaimer below). This return compares favorably to the S&P 500 Total Return Index return of 13.77% and the Nasdaq Composite's total return of 14.18% during the same time period.

The NorthStar Tech Revolution Index is designed to track companies that are creating and developing new revolutionary technologies. "These cutting-edge technologies are considered to 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" said Jim Pritchard, creator of the Index and 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 and NorthStar Tech Revolution Index please visit: [NorthStar Tech Revolution Index \(northstar65.com\)](https://northstar65.com)



Disclaimers

Past performance is no guarantee of future results. The inception date of the NorthStar Tech Revolution Index is 05/29/2024. Charts and graphs are provided for illustrative purposes only. NorthStar Tech Revolution Index is the property of Syntax LLC, which calculates and maintains the Index. Syntax® is a registered trademark of Syntax, LLC and/or its affiliates. Index performance does not represent actual fund or portfolio performance and such performance does not reflect the actual investment experience of any investor. An investor cannot invest directly in an index. In addition, the results actual investors might have achieved would have differed from those shown because of differences in the timing, and amounts of their investments, as well as fees, market frictions and expenses associated with an investment in a portfolio invested in accordance with an index. None of the Indices or the benchmark indices portrayed herein charge management fees directly to end investors or incur brokerage expenses, and no such fees or expenses were deducted from the performance shown; provided, however, that the returns of any investment portfolio invested in accordance with such indices would be net of such fees and expenses. Additionally, none of these indices lend securities, and no revenues from securities lending were added to the performance shown. The performance shown is unaudited and subject to revision.