



## WHY INVEST IN THE STRATEGY?

### High Growth Potential

The Growth Portfolio is engineered for investors who are comfortable with high-risk investments and are seeking aggressive growth. It capitalizes on the potential of major cryptocurrencies like Ethereum and Bitcoin while also amplifying exposure to smaller, high-reward assets such as Maker and Aave. This strategy is designed for those looking to maximize returns in the fast-paced crypto market.

### Risk Management

While the strategy targets high returns, our risk management system remains vigilant, assessing each asset for technological viability, competitive market position, and adherence to the regulatory landscape. This ensures a dynamic portfolio ready to navigate the ups and downs of the market with an eye on long-term growth potential.

### Dedicated Portfolio Management

The Growth Portfolio is nurtured by our seasoned experts who leverage their in-depth experience to capitalize on market opportunities. With continuous market monitoring and strategic asset placement, they aim to drive the portfolio to achieve substantial growth beyond traditional risk parameters.

### Adaptability to Market Dynamics

The portfolio is structured to swiftly pivot in response to market changes, capable of adapting its asset allocation to optimize performance. This adaptability is integral to seizing growth opportunities in a market known for its volatility.

### Focus on Cutting-Edge Innovation

This aggressive strategy is poised to engage with pioneering developments in the crypto sphere, investing in assets that lead and define market trends. It is synchronized with the latest technological advancements, positioning investors at the forefront of digital finance innovation.

### Research-Driven Approach

By integrating thorough top-down and bottom-up research, our portfolio management identifies and capitalizes on primary market movements, isolates optimal crypto asset opportunities, and adeptly manages through market cycles.

## DETAILS

<b>Inception Date</b>	June 30, 2023
<b>Type</b>	Separated Managed Account (SMA)
<b>No of Assets <sup>1</sup></b>	14
<b>Benchmark</b>	Bitcoin Price
<b>Portfolio Provider</b>	Upwealth Digital Asset Management, SAS
<b>Asset Manager</b>	Upwealth Digital Asset Management, SAS
<b>Custodian</b>	Binance Holdings, LTD
<b>Performance, Management Fee</b>	0.00%
<b>Advisory Fee <sup>2</sup></b>	0.00%
<b>Minimum Investment</b>	\$500.00
<b>Rebalanced &amp; Reconstituted</b>	Monthly/Market-responsive reconstitution
<b>Lockup Period</b>	None
<b>Withdrawal Frequency</b>	Daily
<b>Ownership</b>	Investor has direct ownership of crypto assets

<sup>1</sup>The number of crypto assets in the portfolio may vary based on Upwealth's investment strategy, market conditions, and availability.

<sup>2</sup> Free for the first 6 months then 2.00% AUM per year. Offer limited to the first 1000 investors on Upwealth's cryptocurrency investing platform.

## INVESTMENT STRATEGY

The Growth Strategy is assertive, merging established heavyweights with emerging assets for a high-impact market approach. It spans the full digital asset spectrum, aiming to not just temper risks but to significantly boost the portfolio's growth trajectory. Active management, underpinned by deep research and strategic risk assessment, propels the strategy toward aggressive growth.

This is a compelling option for investors seeking to dive into the cryptocurrency market's potential while embracing a higher risk tolerance. It delivers a flexible investment structure that evolves with market advancements, aligning with investors' ambitious goals and risk profiles.

## MARKET CAPITALIZATION

<b>Mega</b> (\$100b+)	15%
<b>Large</b> (\$10 - \$100B)	7%
<b>Medium</b> (\$2 - \$10B)	14%
<b>Small</b> (\$300M - \$2B)	64%
<b>Micro</b> (\$50M - \$300M)	0%

## HOLDINGS

Name / Category	Weight	Name / Category	Weight
<b>Ethereum</b> ETH Layer 1, Smart Contract	22.15%	<b>Lido</b> LDO DeFi, Staking Protocol	3.92%
<b>Bitcoin</b> BTC Monetary Asset	16.90%	<b>Solana</b> SOL Layer 1, Smart Contract	3.26%
<b>Maker</b> MKR DeFi, Staking Protocol	10.05%	<b>The Graph</b> GRT Indexing Protocol	3.24%
<b>Aave</b> AAVE DeFi, Lending Protocol	9.20%	<b>Arweave</b> AR Data Storage	3.11%
<b>Curve</b> CRV Decentralized Exchange	5.88%		
<b>Synthetix</b> SNX DeFi Platform	4.80%		
<b>Render</b> RNDR GPU Rendering Network	4.77%		
<b>Fantom</b> FTM Layer 1, Smart Contract	4.62%		
<b>Gala</b> GALA Gaming & NFTs	4.15%		
<b>THORChain</b> RUNE DeFi, Liquidity Protocol	3.95%		

Holdings are subject to change. Portfolio holdings should not be considered as investment advice or a recommendation to buy, sell or hold any particular cryptocurrency. Current and future holdings are subject to risk.

Upwealth Digital Asset Management SAS does not offer tax advice. Investors should consult with their own advisors with respect to legal, tax, regulatory, financial, accounting, and similar consequences of investing in any Upwealth product, the suitability of the investment for their portfolios, and other relevant considerations regarding an investment in any Upwealth product.

## THE CRYPTOCURRENCY INVESTMENT OPPORTUNITY

Cryptocurrencies are rapidly growing within the global financial market, driven by advanced technology and increasing adoption. Upwealth predicts a significant increase in market capitalization, reflecting an expanding user base. The high liquidity and broad accessibility of cryptocurrencies, along with a limited supply for certain assets, position them as essential for diversified portfolios targeting ambitious growth.

Global Accessibility	Diversification Edge	Tech Evolution
Unlike physical assets, cryptocurrencies can be traded and accessed globally, 24/7, making them highly liquid and borderless.	Cryptocurrencies add variety to investment portfolios with their unique market behavior and potential for returns.	Investors gain access to cutting-edge and emerging tech trends with blockchain's continuous advancements in finance.

## STRATEGY PERFORMANCE

The Upwealth Aggressive Crypto Strategy uses Bitcoin's price as a benchmark, offering a key metric for performance evaluation. This method aligns the strategy with aggressive investment goals, utilizing Bitcoin's market activity as a fundamental indicator for gauging success and potential.

	1 MONTH	3 MONTHS	YTD	1 YEAR	3 YEARS	SINCE INCEPTION
<b>Aggressive Crypto Strategy - Growth</b>	53.27%	54.61%	153.09%	125.49%		47.34%
<b>Bitcoin (BTC) Price</b>	27.98%	40.26%	120.08%	117.83%	104.79%	20.25%

The market price of Bitcoin is provided by CoinMarketCap OpCo, LLC, an analysis platform that aggregates data from various exchanges to offer real-time pricing, market capitalizations, and trading volumes for a wide array of cryptocurrencies. It is an essential resource for crypto market trends and comparative analysis, widely used by investors and researchers.

**Past performance does not guarantee future results.** The performance data quoted represents past performance and current returns may be lower or higher. The investment return and principal will fluctuate so that an investment when redeemed may be worth more or less than the original cost. Returns for less than one year are not annualized. The performance is daily and net of the fee that may be applied for managed portfolios, and reflects the reinvestment of dividends and other earnings as well as forks and airdrops. Upwealth Digital Asset Management SAS ("Upwealth") maintains a model portfolio based on its cryptocurrency strategy. The performance provided is based on a seed account managed by Upwealth in its cryptocurrency strategy. Therefore, the performance shown may differ significantly from the performance of a new portfolio investment depending on the timing of the investments, among other factors. Upwealth makes no representation that the performance shown would have been achieved in any account. The performance data quoted represents past performance of Upwealth's cryptocurrency strategy.

**Before investing, please carefully review the strategy's investment objectives, risks, charges, and expenses.** Reproduction of this material in any form or reference in any publication is strictly prohibited without the explicit written consent of Upwealth Digital Asset Management SAS. The information provided is intended solely for general informational purposes and may change without prior notice. This fact sheet does not imply, either explicitly or implicitly, the provision of services or products by Upwealth and should not be considered as a recommendation to buy, sell, or hold any cryptocurrency. Some statements in this fact sheet may represent future expectations and other forward-looking statements based on Upwealth's current beliefs and assumptions.

These statements involve known and unknown risks and uncertainties that may cause actual results, performance, or events to differ significantly from those expressed or implied in such statements. Upwealth, its clients, and related parties may hold financial interests in securities or issuers discussed.

**Cryptocurrency Risk:** Cryptocurrency, often referred to as 'virtual currency' or 'digital currency,' operates as a decentralized, peer-to-peer financial exchange and value storage used as a form of currency. The strategy may include exposure to cryptocurrencies like bitcoin and ethereum. The market prices of bitcoin, ethereum and other cryptocurrencies have experienced significant fluctuations and could potentially decline sharply, even to zero, due to various reasons, including regulatory changes, network-related issues, events involving entities facilitating transactions, or shifts in user preferences toward alternative cryptocurrencies. Events impacting one cryptocurrency may affect the value of others, including bitcoin and ethereum. Cryptocurrency operates independently of central authorities or banks and lacks government backing. It is not considered legal tender, and its use and exchange may be restricted by federal, state, or foreign governments, with ongoing regulation in the United States. Cryptocurrency exchanges may cease operations or permanently close due to fraud, technical problems, hacking, or malware.