

TRU||VESTMENTS

**The Barbell Economy®**  
**Portfolio Reviews**

# The Barbell Economy Portfolio®

## Reviews

*Cumulative Snapshot through the year-end 2025*

# Barbell Growth Portfolio Through End of 2025



## Barbell Economy Growth Portfolio

The Portfolio puts less weight on current dividend income and instead places more focus on companies which management feels are expanding within the economic channels defined by the Barbell Economy and unfolding demographic trends. Given a higher focus on perceived future growth characteristics, all investors can expect a greater range of volatility during difficult or strained market conditions. The portfolio consists of companies with growth objectives and/or strategies we feel are within the expected channels of expansion as the generations which weigh heavily on the Barbell effect in the US economy age into the years ahead. It remains our view that as the 2020s and 2030s unfold, growth is set to continue to surprise to the upside, even as markets are compressed during normal, expected setback windows and potholes ahead. Keep in mind, during all of the headline mayhem, a “repeat” of the Roaring 20’s remains a very significant potential pathway ahead.

History and Statistics	2012*	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Cumulative Results**
NYSE Composite Index	12.92	23.2	4.22	-6.4	9.01	15.84	-11.20	21.88	4.40	18.17	-11.53	10.99	13.32	15.29	120.07
Barbell Growth Portfolio	18.23	39.9	15.32	3.74	19.90	20.03	-12.3	26.95	42.43	23.91	-15.45	36.86	21.41	25.34	266.33
<b>Barbell Net Difference (%)</b>	<b>5.31</b>	<b>16.77</b>	<b>11.10</b>	<b>10.15</b>	<b>10.89</b>	<b>4.19</b>	<b>-1.08</b>	<b>5.07</b>	<b>38.03</b>	<b>5.74</b>	<b>-3.92</b>	<b>25.87</b>	<b>8.09</b>	<b>10.05</b>	<b>146.26</b>
S&P 500 Index	13.41	29.60	11.39	-0.7	9.54	19.42	-6.94	28.71	16.26	26.85	-19.65	24.23	23.31	15.89	191.29
Barbell Growth Portfolio	18.23	39.9	15.32	3.74	19.90	20.03	-12.3	26.95	42.43	23.91	-15.45	36.86	21.41	25.34	266.33
<b>Barbell Net Difference (%)</b>	<b>4.82</b>	<b>10.34</b>	<b>3.93</b>	<b>4.47</b>	<b>10.36</b>	<b>0.61</b>	<b>-5.34</b>	<b>-1.76</b>	<b>26.17</b>	<b>-2.94</b>	<b>4.20</b>	<b>12.63</b>	<b>-1.90</b>	<b>9.45</b>	<b>75.04</b>

Cumulative Annual Results	1 YR	3 YRS	5 YRS
NYSE Composite Index	13.32	12.78	43.91
Barbell Growth Portfolio	21.41	45.32	109.16
<b>Barbell Net Difference (%)</b>	<b>8.09</b>	<b>32.54</b>	<b>65.25</b>
S&P 500 Index	23.31	27.89	71.00
Barbell Growth Portfolio	21.41	45.32	109.16
<b>Barbell Net Difference (%)</b>	<b>-1.90</b>	<b>17.43</b>	<b>38.16</b>

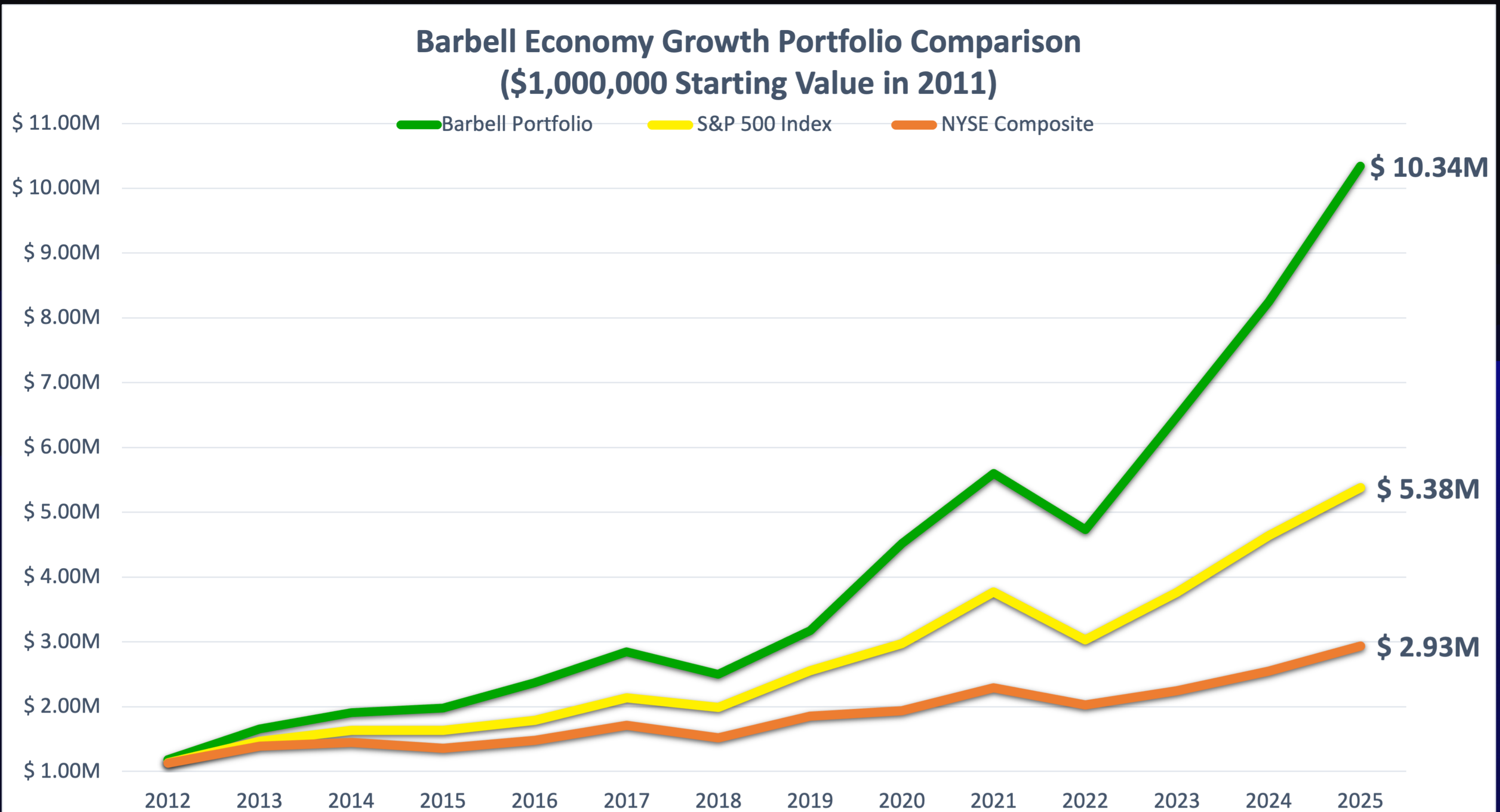
Portfolio Statistics
Starting Positions 2025
Annual Turnover
Starting Yield 2025

\*Portfolio Began 01/01/2012

\*\*Non-Compounded Returns

**DISCLOSURES:** The above referenced summaries are net of a fee of 1.60%, allowing for the typical range advisors use. Typically, that cost will range from between 0.75% to 1.75% depending on account sizes and the financial services rendered. Finally, it is also important to recognize that the years 2012 - 2025 results encompass periods when management used the portfolios for in-house clientele as well as offered the portfolios to other advisors for use with their clientele through a consulting offering. Hence, it is highly likely that varying results were reached by different parties where management was not in control of the trading or advisory service for a particular client. Past performance is not a guarantee of any future results. Please consult your advisor before making any investment decisions. Nothing herein is ever intended to be investment advice. Reference to any specific securities does not constitute an offer to buy or sell securities in any jurisdiction. All public data received from what are expected to be reliable sources. Truvestments Capital, LLC is not responsible for any damages or losses arising from any use of this information. Investment advisory services are offered through Truvestments Capital, LLC, a SEC-registered investment advisor. All data through DECEMBER 31, 2025. Copyright 2026. All Rights Reserved.

# Barbell Growth Portfolio Through End of 2025

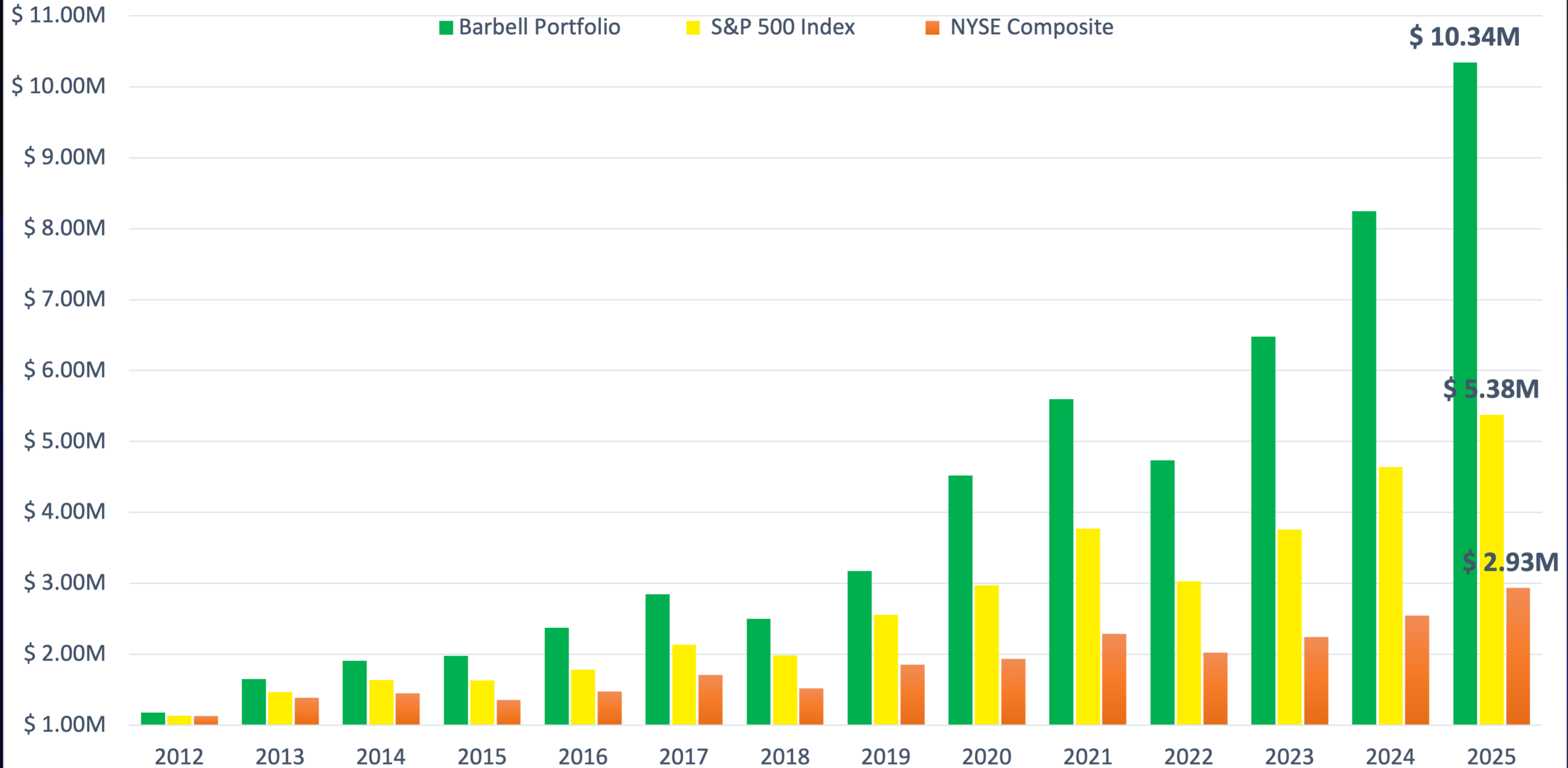


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# Barbell Growth Portfolio Through End of 2025

**Barbell Economy Growth Portfolio Comparison  
(\$1,000,000 Starting Value in 2011)**



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# Barbell Tech Portfolio Through End of 2025



## Barbell Economy Tech Portfolio

Generation Y (followed by Gen Z) is the most technologically advanced generation to ever inhabit the planet. The impact their technological prowess will have on our lives will redefine the word change. And when we say change – we mean change in ways that cannot be comprehended or defined effectively today. The tech world will bring tools, cloud channels, deep software and gadgets to us at light speed – all of which will make life easier, more efficient, closer. The power of Generation Y, their record size and the powder keg of technology they have grown up on and are creating daily, is collectively set to power all of us into a reality which will shock our senses. The price? A demand for patience and discipline, acceptance of **more volatile positions** and a portfolio which will likely change more often due to buyouts and/or replacements.

History and Statistics	2017*	2018	2019	2020	2021	2022	2023	2024	2025	Cumulative Results**
NYSE Composite Index	11.10	-11.20	21.88	4.40	18.17	-11.53	10.99	13.32	15.29	NYSE Composite Index 72.42
Barbell Tech Portfolio	21.85	-2.28	31.69	72.56	28.42	-28.96	41.73	40.78	28.05	Barbell Tech Portfolio 233.84
<b>Barbell Net Difference (%)</b>	<b>10.75</b>	<b>8.92</b>	<b>9.81</b>	<b>68.16</b>	<b>10.25</b>	<b>-17.43</b>	<b>30.74</b>	<b>27.46</b>	<b>12.76</b>	<b>Barbell Net Difference (%) 161.42</b>
S&P 500 Index	10.84	-6.94	28.71	16.26	26.85	-19.65	24.23	23.31	15.89	S&P 500 Index 119.50
Barbell Tech Portfolio	21.85	-2.28	31.69	72.56	28.42	-28.96	41.73	40.78	28.05	Barbell Tech Portfolio 233.84
<b>Barbell Net Difference (%)</b>	<b>11.01</b>	<b>4.66</b>	<b>2.98</b>	<b>56.3</b>	<b>1.57</b>	<b>-9.31</b>	<b>17.50</b>	<b>17.47</b>	<b>12.16</b>	<b>Barbell Net Difference (%) 114.34</b>
Nasdaq Composite Index	10.67	-3.88	33.60	43.64	21.38	-33.10	43.42	28.64	19.21	Nasdaq Index 163.58
Barbell Tech Portfolio	21.85	-2.28	31.69	72.56	28.42	-28.96	41.73	40.78	28.05	Barbell Tech Portfolio 233.84
<b>Barbell Net Difference (%)</b>	<b>11.18</b>	<b>1.60</b>	<b>-1.91</b>	<b>28.92</b>	<b>7.04</b>	<b>4.14</b>	<b>-1.69</b>	<b>12.14</b>	<b>8.84</b>	<b>Barbell Net Difference (%) 70.26</b>

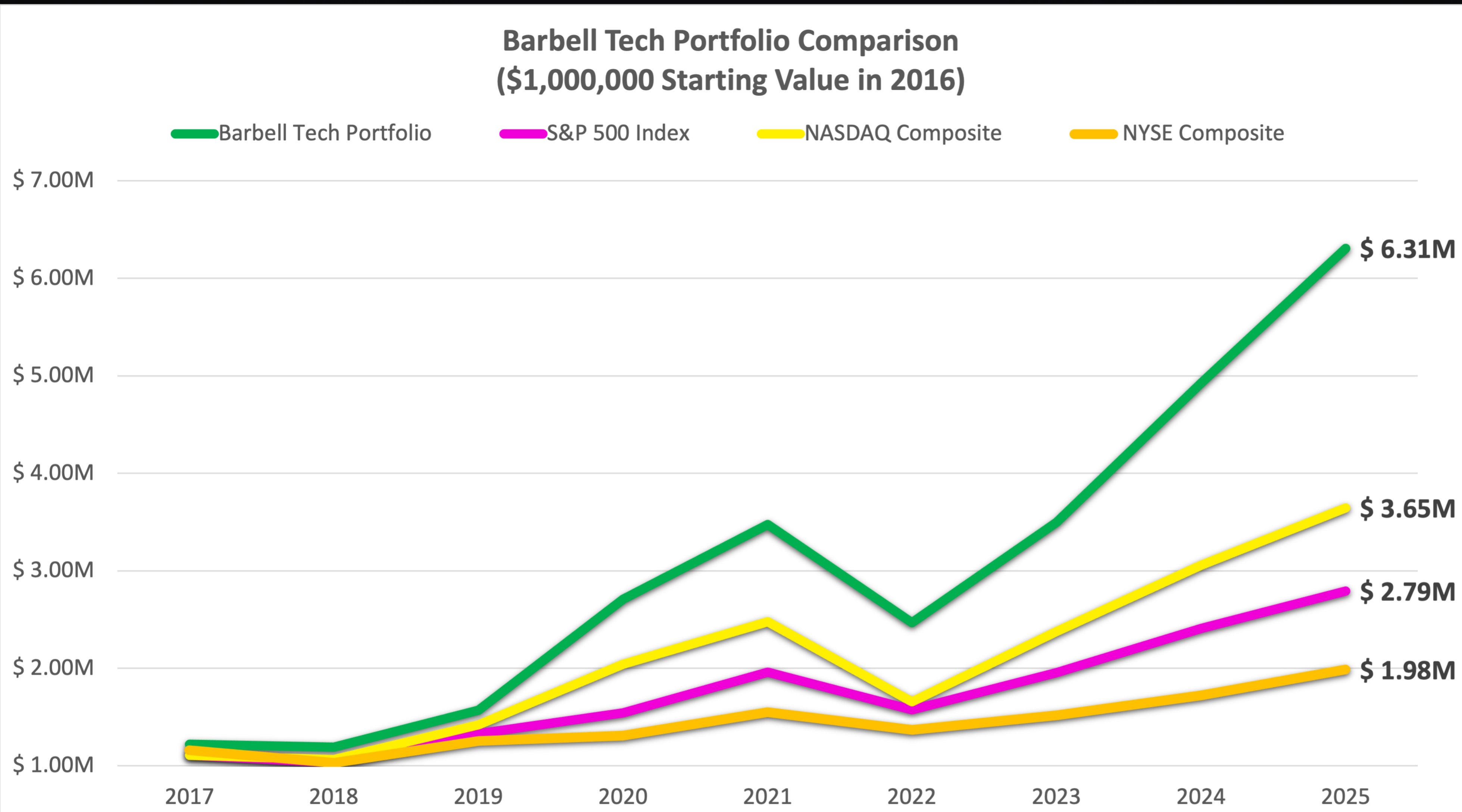
\*Portfolio Beginning Date June 1, 2017

\*\*Non-compounded returns

Portfolio Stats Summary	2025
Starting Portfolio Positions 2025	49
Portfolio Yield	0.74%
Portfolio Turnover	22.81%

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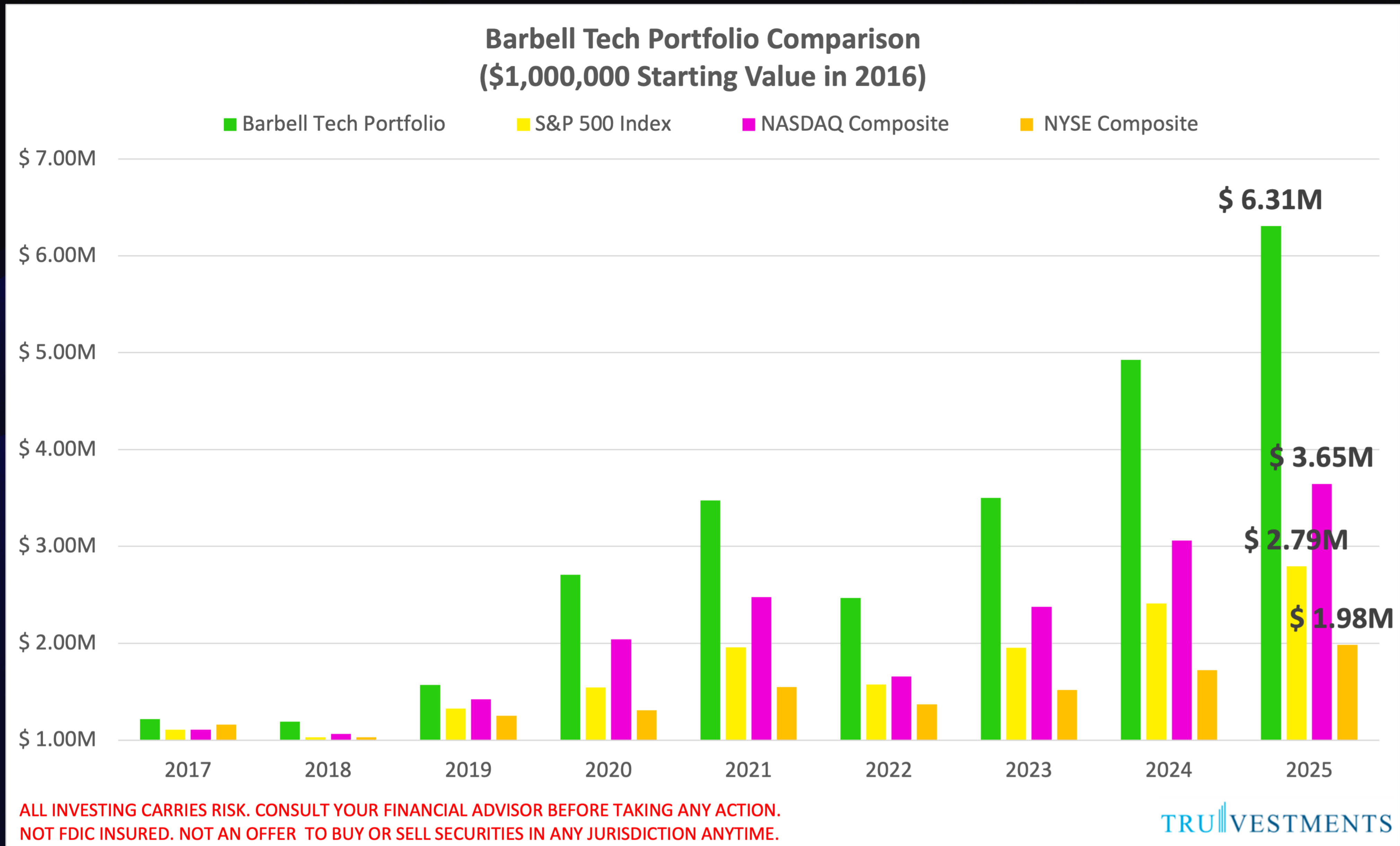
# Barbell Tech Portfolio Through End of 2025



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# Barbell Tech Portfolio Through End of 2025



# Barbell Dividend Portfolio Through End of 2025



## Barbell Economy Dividend Income Portfolio

This Portfolio focuses on companies with a long-term history of consistent annual dividend growth. Underlying that quantitative process, we focus on companies we feel are “in the way” of coming waves of demand as the next generation takes control of the US economy – using the same benefits of the Barbell Economy. History shows dividends play a positive role in returns over long periods of time for patient investors. It is important to note also the general “character” activity a dividend portfolio tends to exhibit. During times of difficult market action to the downside, dividends tend to fall less. Think of it as a shock absorber effect. On the other hand, when markets are in a general growth mode, you will see that dividend portfolios tend to lag a bit behind the general market. The focus over time? Expanding annual dividend income. Note also that while Technology brings greater benefit to expanding areas of our lives, the Barbell Dividend Portfolio will struggle to “beat” the S&P 500 given its extraordinary technology weighting. For example, at the time of this posting, the “Mag 7” now comprise over 33% of the S&P 500 weighting. Hence, we have provided comparisons to S&P 500 market-weight, equal-weight and dividend ETF results for all to review.

History and Statistics	2015*	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Cumulative Results**
NYSE Composite Index	-6.63	9.01	15.84	-11.20	21.88	4.40	18.17	-11.53	10.99	13.32	15.29	79.54
Barbell Dividend Income Portfolio	3.19	16.57	16.65	-5.08	24.75	9.78	21.98	-10.67	11.43	14.01	5.65	108.26
<b>Barbell Net Difference (%)</b>	<b>9.82</b>	<b>7.56</b>	<b>0.81</b>	<b>6.12</b>	<b>2.87</b>	<b>5.38</b>	<b>3.81</b>	<b>0.86</b>	<b>0.44</b>	<b>0.69</b>	<b>-9.64</b>	<b>28.72</b>
S&P 500 Index	-0.73	9.54	19.42	-6.94	28.71	16.26	26.85	-19.65	24.23	23.32	15.89	136.90
Barbell Dividend Income Portfolio	3.19	16.57	16.65	-5.08	24.75	9.78	21.98	-10.67	11.43	14.01	5.65	108.26
<b>Barbell Net Difference (%)</b>	<b>3.92</b>	<b>7.03</b>	<b>-2.77</b>	<b>1.86</b>	<b>-3.96</b>	<b>-6.48</b>	<b>-4.87</b>	<b>8.98</b>	<b>-12.80</b>	<b>-9.31</b>	<b>-10.24</b>	<b>-28.64</b>
Equal-Weighted S&P 500 (RSP)	-4.52	13.36	17.94	-9.57	24.89	10.21	24.25	-13.79	13.70	11.05	11.37	98.89
Barbell Dividend Income Portfolio	3.19	16.57	16.65	-5.08	24.75	9.78	21.98	-10.67	11.43	14.01	5.65	108.26
<b>Barbell Net Difference (%)</b>	<b>7.71</b>	<b>3.21</b>	<b>-1.29</b>	<b>4.49</b>	<b>-0.14</b>	<b>-0.43</b>	<b>-2.27</b>	<b>3.12</b>	<b>-2.27</b>	<b>2.96</b>	<b>-5.72</b>	<b>9.37</b>

### Portfolio Stats Summary

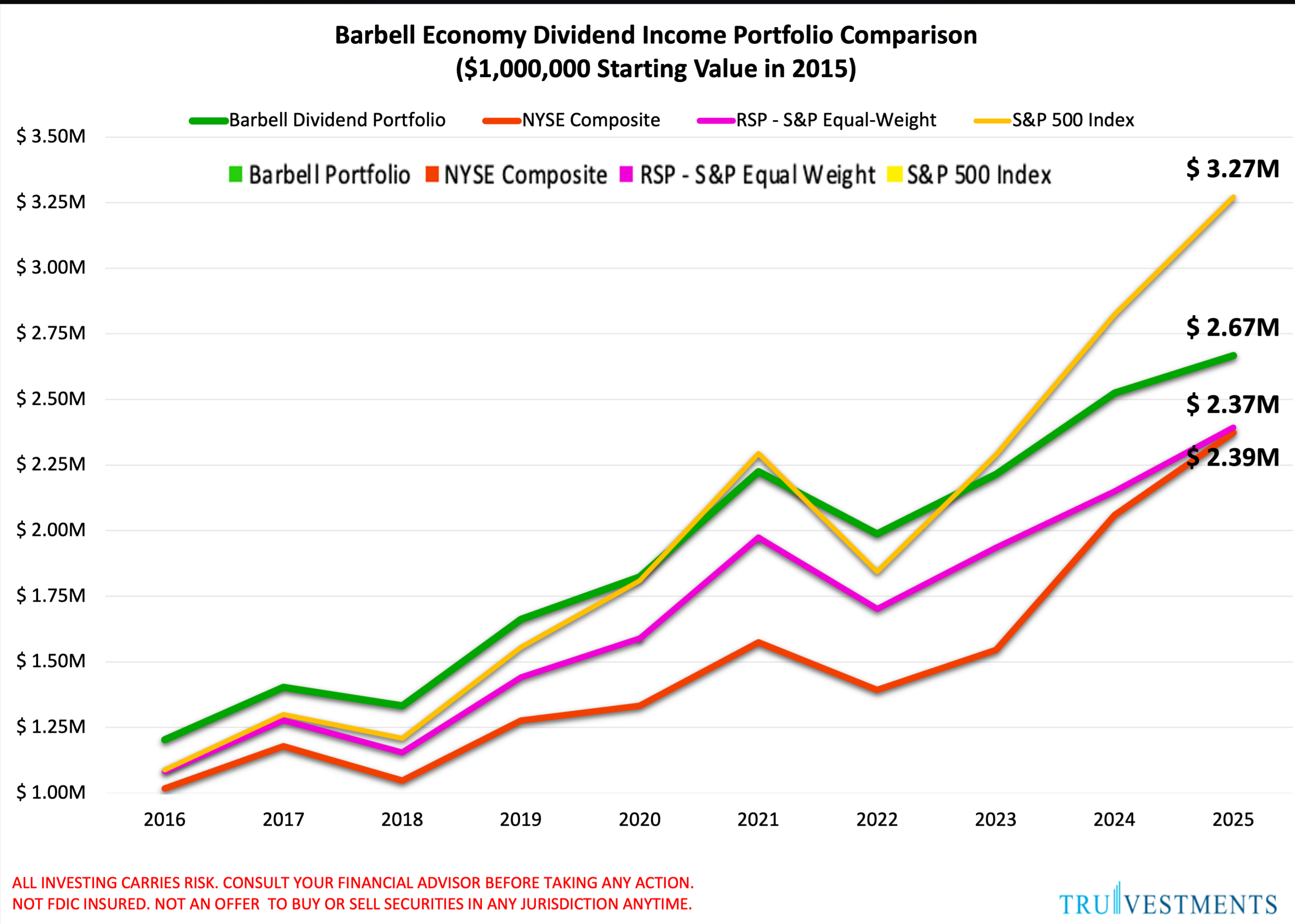
Positions Starting 2025	49
Average Annual Turnover	23.04%
Average Start 2025 Yield	5.01%

\*from June 30, 2015 onward

\*\*Non-compounded returns

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# Barbell Dividend Portfolio Through End of 2025

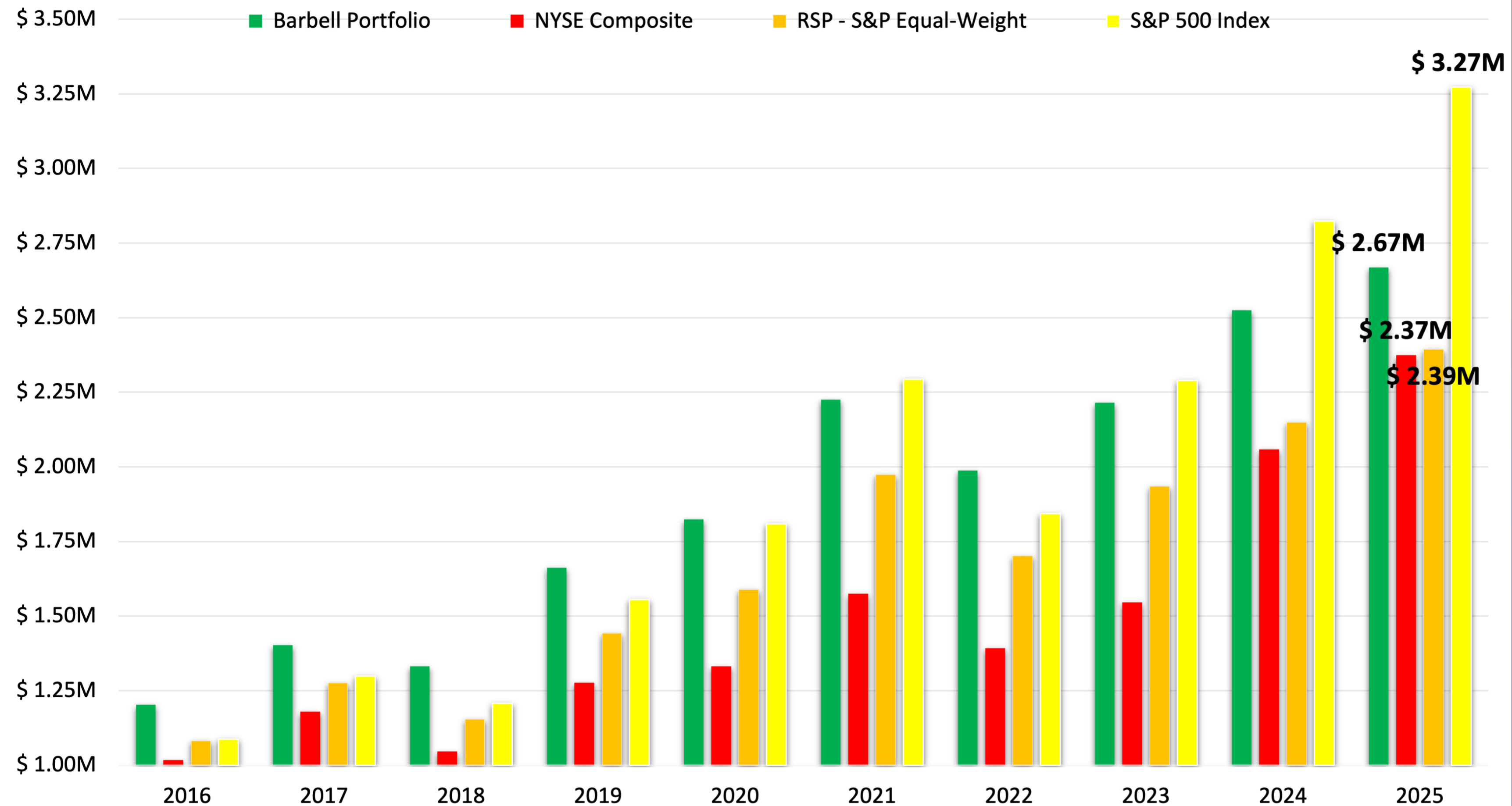


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# Barbell Dividend Portfolio Through End of 2025

Barbell Economy Dividend Income Portfolio Comparison  
(\$1,000,000 Starting Value in 2015)



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# Barbell Biotech Portfolio Through End of 2025



## Barbell Economy Biotech Portfolio

Biotech is the chosen sector of the Baby Boomer end of the Barbell Economy, where data suggest powerful tech, medical and scientific forces are all converging to bring significant health benefits to all generations. The significance of those changes are set to be life-changing and can hold important value for the patient investor. Even so, it is vitally important that all investors using this particular portfolio understand that the volatility is surely higher than what many other portfolios have historically shown. This demands patience and discipline, along with a long-term horizon, permitting values to unfold over time while bringing life-changing treatments and services to patients needing such solutions around the world.

History and Statistics	2017*	2018	2019	2020	2021	2022	2023	2024	2025	Cumulative Results**
NYSE Composite Index	11.10	-11.20	21.88	4.40	18.17	-21.44	10.99	13.32	15.29	NYSE Composite Index 62.51
Barbell Biotech Portfolio	46.59	-2.55	25.11	23.86	3.47	-16.74	26.52	11.28	52.01	Barbell Biotech Portfolio 169.55
<b>Barbell Net Difference (%)</b>	<b>35.49</b>	<b>8.65</b>	<b>3.23</b>	<b>19.46</b>	<b>-14.70</b>	<b>4.70</b>	<b>15.53</b>	<b>-2.04</b>	<b>36.72</b>	<b>Barbell Net Difference (%) 107.04</b>
S&P 500 Index	10.84	-6.94	28.71	16.26	26.85	-25.19	24.23	23.31	15.89	S&P 500 Index 113.96
Barbell Biotech Portfolio	46.59	-2.55	25.11	23.86	3.47	-16.74	26.52	11.28	52.01	Barbell Biotech Portfolio 169.55
<b>Barbell Net Difference (%)</b>	<b>35.75</b>	<b>4.39</b>	<b>-3.6</b>	<b>7.60</b>	<b>-23.38</b>	<b>8.45</b>	<b>2.29</b>	<b>-12.03</b>	<b>36.12</b>	<b>Barbell Net Difference (%) 55.59</b>
NYSE Biotech Index IBB	8.28	-9.68	24.97	26.77	1.73	-23.27	3.76	-2.68	28.42	NYSE Biotech Index IBB 58.30
Barbell Biotech Portfolio	46.59	-2.55	25.11	23.86	3.47	-16.74	26.52	11.28	52.01	Barbell Biotech Portfolio 169.55
<b>Barbell Net Difference (%)</b>	<b>38.31</b>	<b>7.13</b>	<b>0.14</b>	<b>-2.91</b>	<b>1.74</b>	<b>6.53</b>	<b>22.76</b>	<b>13.96</b>	<b>23.59</b>	<b>Barbell Net Difference (%) 111.25</b>

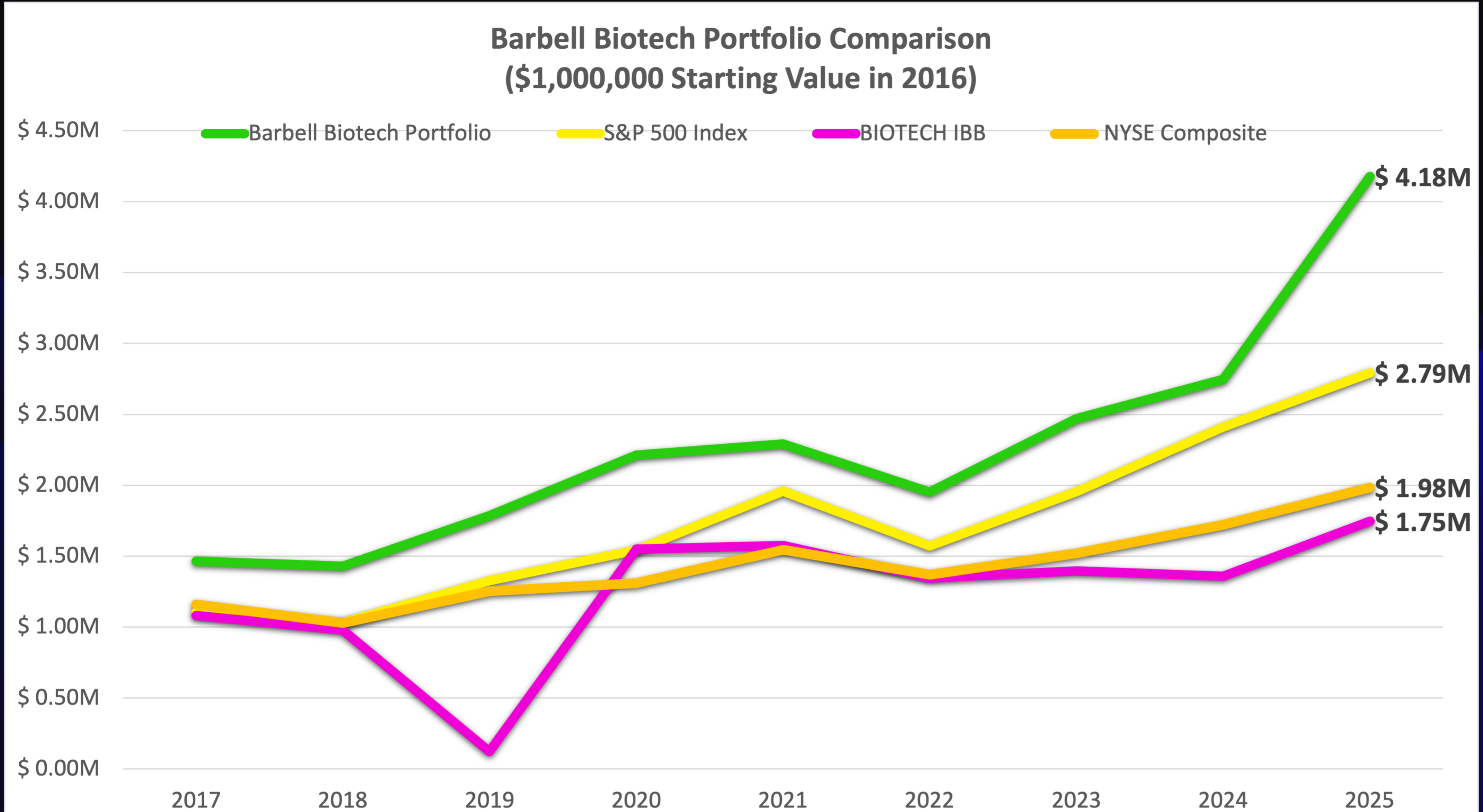
\*Portfolio Beginning Date June 1, 2017

\*\*Non-compound returns

Portfolio Stats Summary	2025
Starting Portfolio Positions	35
Annual Portfolio Turnover	25.42%

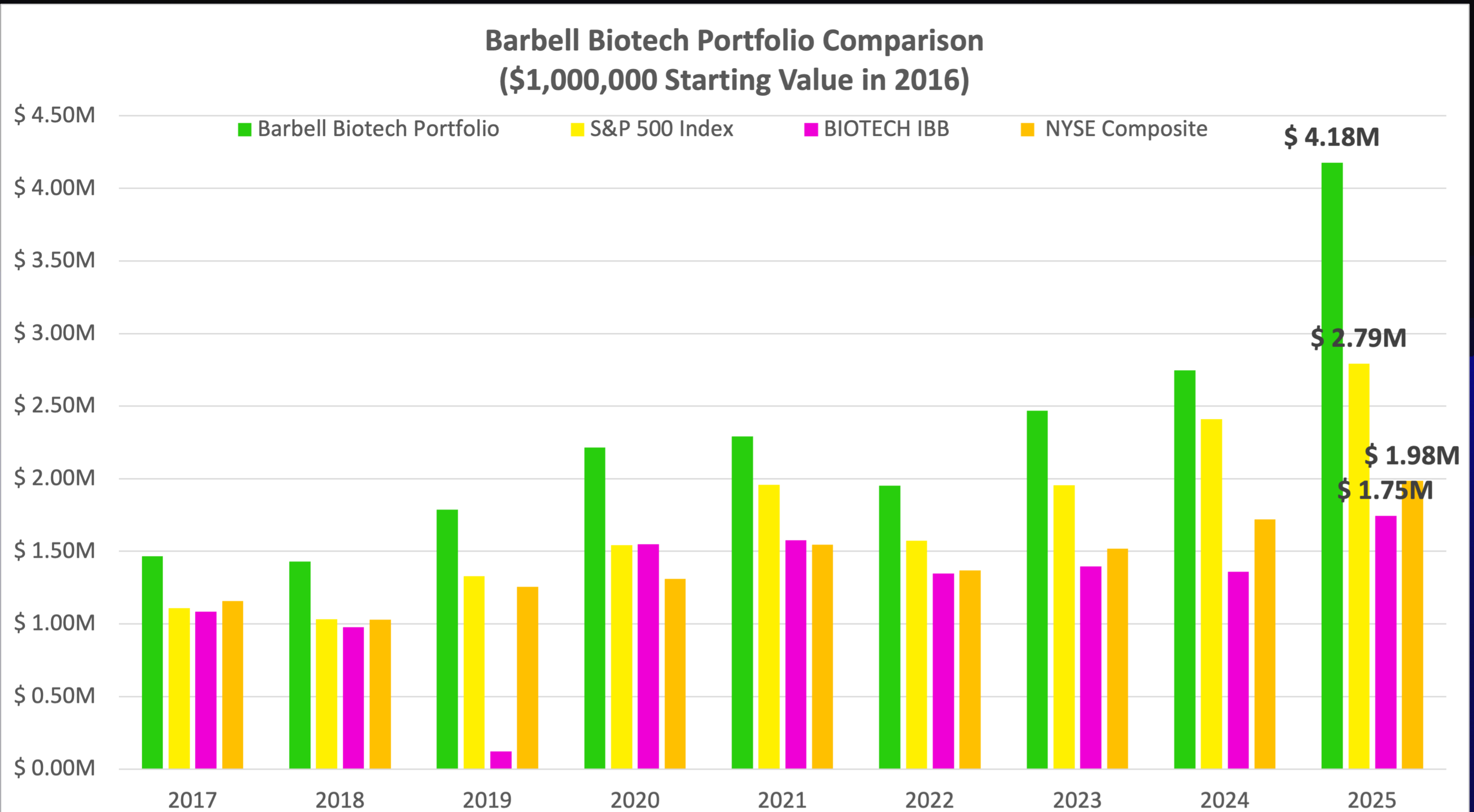
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# Barbell Biotech Portfolio Through End of 2025



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# Barbell Biotech Portfolio Through End of 2025



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# Barbell Foundation Portfolio Through End of 2025



## Barbell Economy Foundation Portfolio

The Foundation portfolio provides clients a solution as they build for their future steps in wealth management. Designed for accounts up to \$150,000, this portfolio builds around the projected demand channels of the Barbell Economy® and its future expansion. The interest was to provide for multi-cap platform exposure for clients looking to buildout their future plans. Generation Y (followed by Gen Z) make up the most technologically advanced generations to ever inhabit the planet. The impact their technological prowess will have on our lives will redefine the word “change.” And when we say change – we mean change in ways that cannot be comprehended or defined effectively today. The issue? It is a bit more difficult to provide for a comparable index, so we have included a broad market index, a large cap index and a small cap index for transparency and full perspective.

History and Statistics	2019*	2020	2021	2022	2023	2024	2025	Cumulative Results**
NYSE Composite Index	6.62	4.40	18.17	-11.53	10.99	13.32	15.29	NYSE Composite Index 57.26
Barbell Foundation Portfolio	8.47	16.14	31.90	-7.06	19.42	23.69	26.87	Barbell Small Account Portfolio 119.43
<b>Barbell Net Difference (%)</b>	<b>1.85</b>	<b>11.74</b>	<b>13.73</b>	<b>4.47</b>	<b>8.43</b>	<b>10.37</b>	<b>11.58</b>	<b>Barbell Net Difference (%) 62.17</b>
S&P 500 Equal-Weight (RSP)	8.30	10.21	24.25	-13.79	13.70	11.05	15.89	S&P 500 EW Index (RSP) 69.61
Barbell Foundation Portfolio	8.47	16.14	31.90	-7.06	19.42	23.69	26.87	Barbell Small Account Portfolio 119.43
<b>Barbell Net Difference (%)</b>	<b>0.17</b>	<b>5.93</b>	<b>7.65</b>	<b>6.73</b>	<b>5.72</b>	<b>12.64</b>	<b>10.98</b>	<b>Barbell Net Difference (%) 49.82</b>
Russell 2000 Index (IWM)	7.31	20.08	14.29	-20.60	16.79	10.02	12.95	Russell 2000 Index (IWM) 60.84
Barbell Foundation Portfolio	8.47	16.14	31.90	-7.06	19.42	23.69	26.87	Barbell Small Account Portfolio 119.43
<b>Barbell Net Difference (%)</b>	<b>1.16</b>	<b>-3.94</b>	<b>17.61</b>	<b>13.54</b>	<b>2.63</b>	<b>13.67</b>	<b>13.92</b>	<b>Barbell Net Difference (%) 58.59</b>

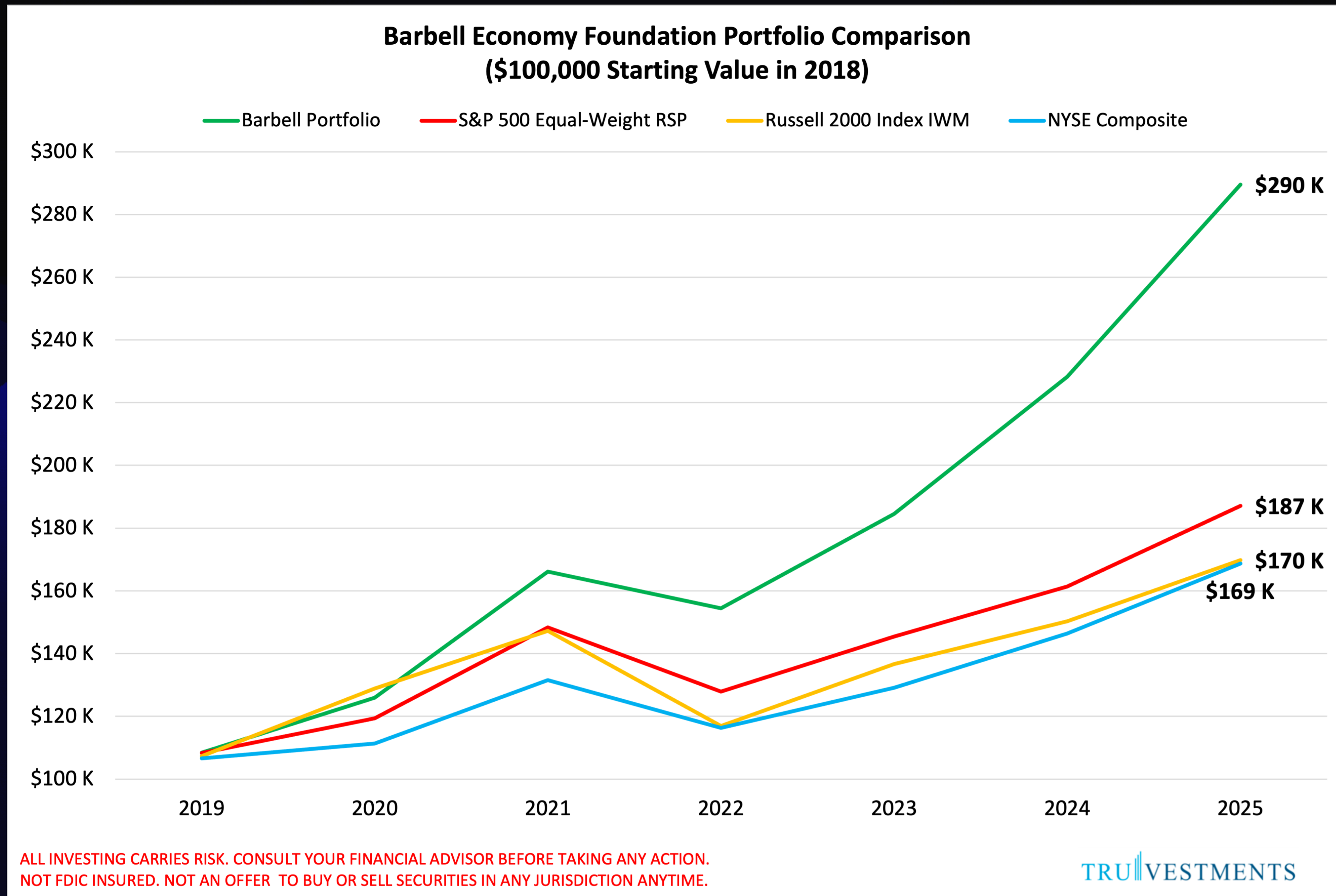
\*Portfolio Beginning Date June 30, 2019

\*\*Non-compound returns

Portfolio Stats Summary	2025
Starting Portfolio Positions	24
Portfolio Yield	0.68%
Portfolio Turnover	21.51%

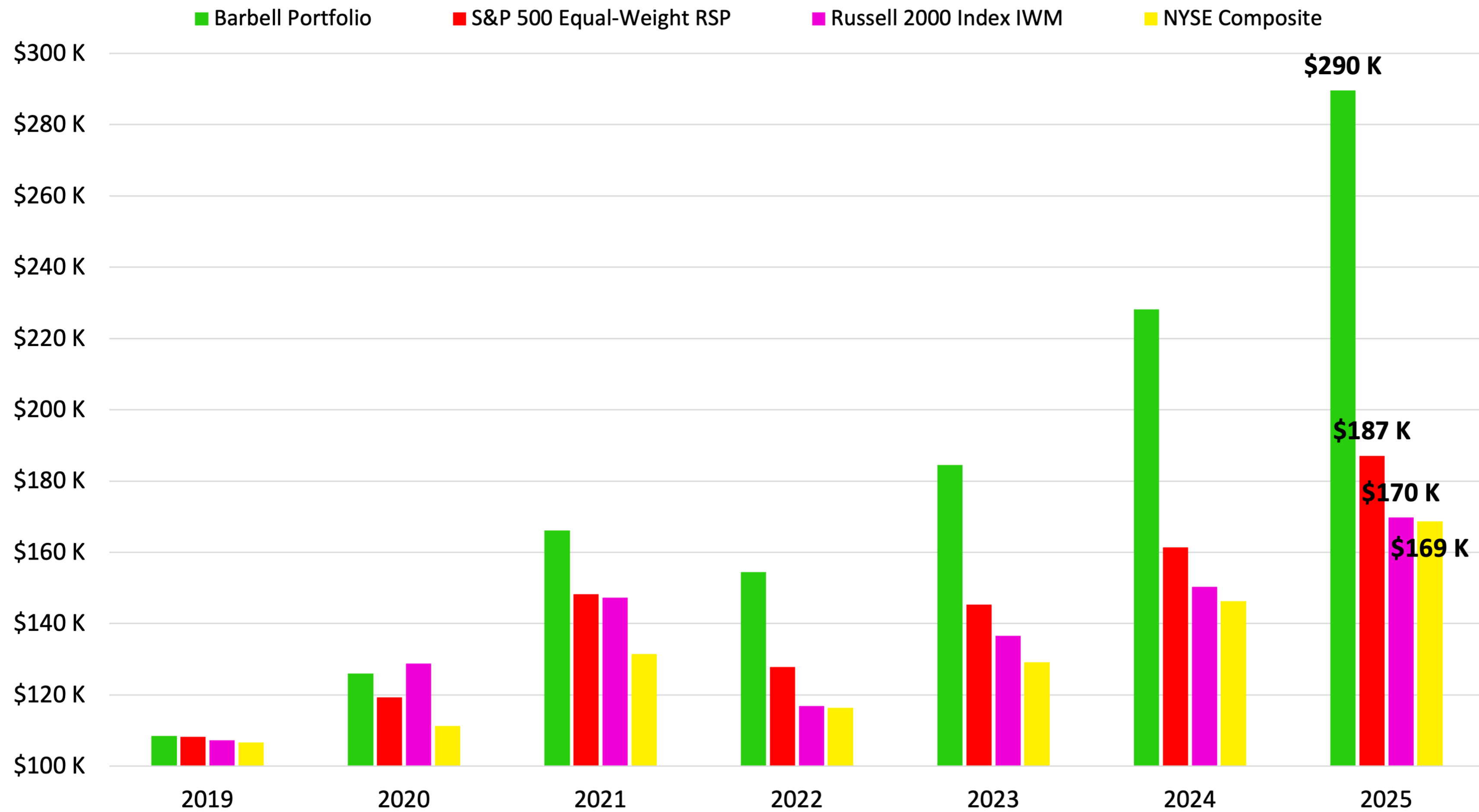
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# Barbell Foundation Portfolio Through End of 2025



# Barbell Foundation Portfolio Through End of 2025

Barbell Economy Foundation Portfolio Comparison  
(\$100,000 Starting Value in 2018)



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