

SECTOR	CORPORATION	SIMBOL	C	SELL	C	HOLD	C	PERFORM	C	OUTPERFORM
Consumer Discretionary	AMAZON COM INC	AMZN		X		X		X		OUTPERFORM
Information Technology	AVALARA INC	AVLR		X		X		X		OUTPERFORM
Information Technology	COUPA SOFTWARE INC	COUP		X		X		X		OUTPERFORM
Information Technology	OKTA INC CLASS A	OKTA		X		X		X		OUTPERFORM
Information Technology	CROWDSTRIKE HOLDINGS INC CLASS A	CRWD		X		X		X		OUTPERFORM
Information Technology	DATADOG INC CLASS A	DDOG		X		X		X		OUTPERFORM
Information Technology	DOCUSIGN INC	DOCU		X		X		X		OUTPERFORM
Health Care	BIOMARIN PHARMACEUTICAL INC	BMRN		X		X		PERFORM		X
Consumer Discretionary	TESLA INC	TSLA		X		X		PERFORM		X
Information Technology	NVIDIA CORP	NVDA		X		X		PERFORM		X
Information Technology	ASML Holding	ASML		X		X		PERFORM		X
Information Technology	PayPal Holdings	PYPL		X		X		PERFORM		X
Information Technology	APPLE INC	AAPL		X		HOLD		X		X
Information Technology	ADOBE INC	ADBE		X		HOLD		X		X