

INVEST%	C	SECTOR	CORPORATION	SIMBOL	C	#1	C	SELL	C	HOLD	C	PERFORM	C	OUTPERFORM
100%		Consumer Discretionary	AMAZON COM INC	AMZN		1		.		.		.		OUTPERFORM
100%		Information Technology	AVALARA INC	AVLR		0		.		.		.		OUTPERFORM
100%		Information Technology	COUPA SOFTWARE INC	COUP		1		.		.		.		OUTPERFORM
100%		Information Technology	DOCUSIGN INC	DOCU		1		.		.		.		OUTPERFORM
100%		Health Care	BIOMARIN PHARMACEUTICAL INC	BMRN		1		.		.		PERFORM		.
100%		Consumer Discretionary	TESLA INC	TSLA		0		.		.		PERFORM		.
50%		Information Technology	APPLE INC	AAPL		1		.		HOLD		.		.
25%		Information Technology	ADOBE INC	ADBE		1		.		HOLD		.		.
25%		Information Technology	ASML Holding	ASML		0		.		HOLD		.		.
25%		Information Technology	CROWDSTRIKE HOLDINGS INC CLASS A	CRWD		1		.		HOLD		.		.
25%		Information Technology	DATADOG INC CLASS A	DDOG		0		.		HOLD		.		.
25%		Information Technology	LAM RESEARCH CORP	LRCX		1		.		HOLD		.		.
25%		Communication	NETFLIX INC	NFLX		1		.		HOLD		.		.
25%		Information Technology	OKTA INC CLASS A	OKTA		1		.		HOLD		.		.
25%		Information Technology	PayPal Holdings	PYPL		0		.		HOLD		.		.
10%		Information Technology	NVIDIA CORP	NVDA		0		SELL		.		.		.