LEGACY BRIDGE
PRIVATE FAMILY OFFICES

Large Cap Core Equity
Q3-2026 Factsheet

The Legacy Bridge Large Cap Composite is a weighted average of the U.S. Large Cap component of 47 client portfolios. This composite is managed to our core equity process. We measure our returns to the Morningstar Open Ended U.S. Large Cap Blend peer group. This Morningstar class is currently comprised of 1,018 mutual funds. Our process is to pursue consistent, above average returns relative to our peer group in all economic environments.

Trailing Returns - Through 09/30/26

Source Data: Total Return Calculation Benchmark: S&P 500 (TR) (1970)

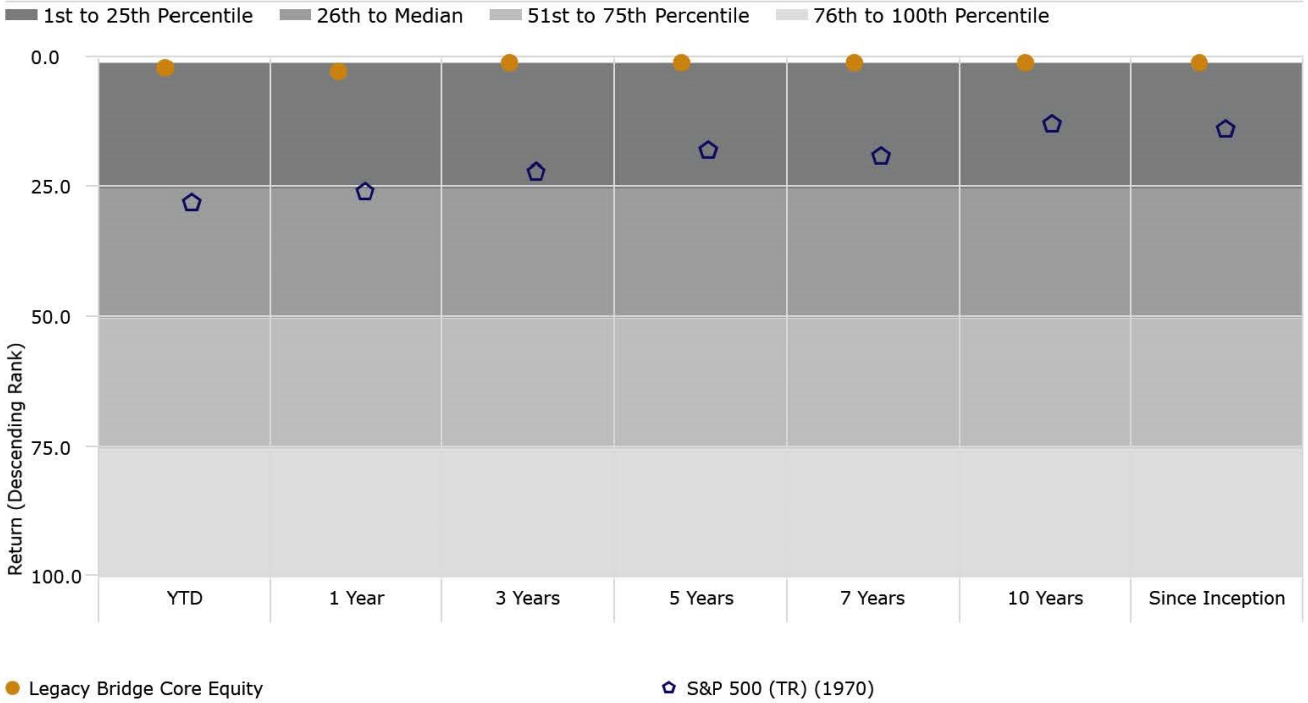
Inception 6/30/2016	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception
Legacy Bridge Core Equity	23.12	25.22	31.11	18.24	20.41	18.18	18.03
S&P 500 (TR) (1970)	12.75	15.74	22.89	13.79	16.17	15.33	15.36
US Fund Large Blend	10.89	13.33	19.84	11.43	13.65	13.07	13.14

Legacy Bridge Rankings Within the Morningstar US Large Cap Blend Peer Group - 09/30/26

Inception 6/30/2016	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception
Legacy Bridge Core Equity	23.12	25.22	31.11	18.24	20.41	18.18	18.03
Peer group rank	17	22	6	2	5	4	4
# of Managers ranked in peer group	1,359	1,339	1,249	1,172	1,114	1,022	1,016

Performance Relative to Peer Group (descending rank)

Peer Group: Funds - U.S. - Large Blend



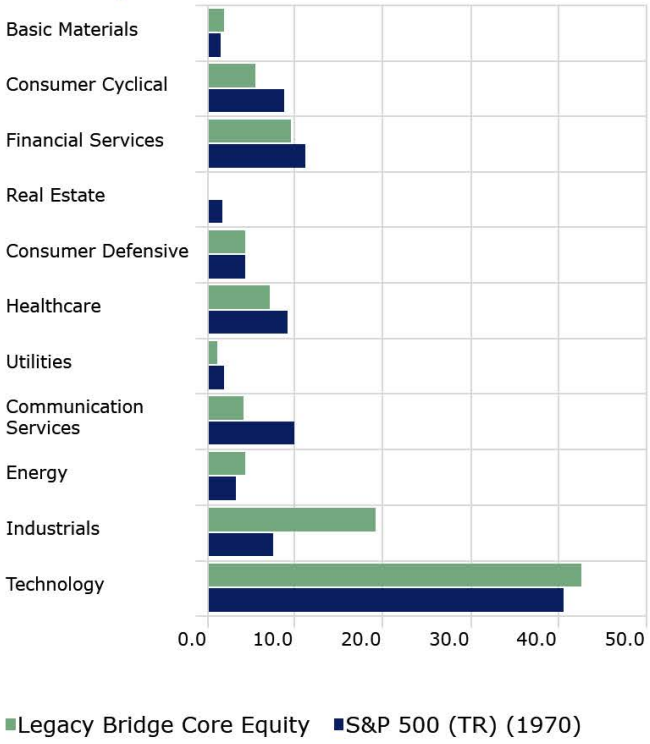
Source: Morningstar Direct

Top Holdings - Legacy Bridge Core Equity

Portfolio Date: 9/30/2026

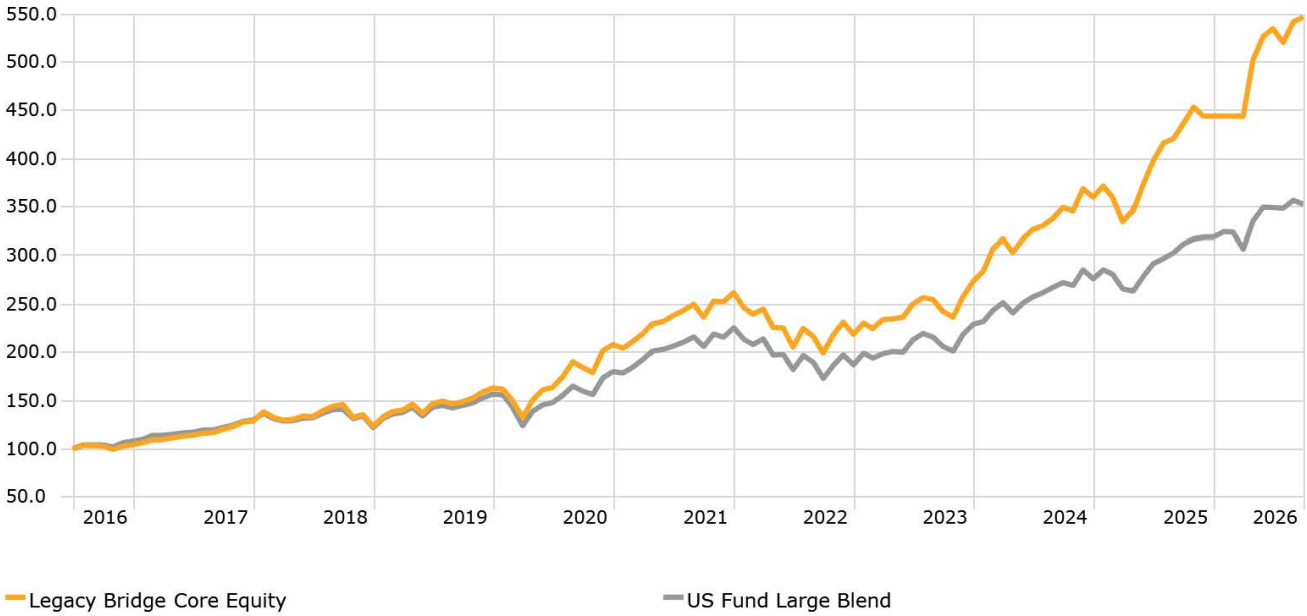
	Portfolio Weighting %
NVIDIA Corp	7.28
Palantir Technologies Inc Ordinary Shares - Class A	5.40
GE Vernova Inc	5.09
Arista Networks Inc	4.80
Broadcom Inc	3.96
Micron Technology Inc	3.41
Caterpillar Inc	3.07
Microsoft Corp	2.78
Advanced Micro Devices Inc	2.36
Palo Alto Networks Inc	2.33

Sector Exposure



Investment Growth

Time Period: 7/1/2016 to 9/30/2026



Source: Morningstar Direct

DISCLOSURES:

Legacy Bridge Core Equity represents all discretionary accounts under management with assets greater than $500,000, do not have legacy assets, client restrictions, an Income Investment Objective or an Income Stock Strategy. The performance is not a representation of any client's actual performance so is considered hypothetical performance. There is no cash allocated to the composite.

This report has been prepared from data believed reliable, but no representation is made as to accuracy or completeness.

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Results are net of investment advisory fees. Advisory fees vary among clients. Actual results will be reduced by the fees applicable to the actual client. Results reflect the reinvestment of dividends and other earnings. The investment advisory fees are described in Part 2A of Form ADV.

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References in this presentation made to various financial indices are for illustrative purposes only and making a decision to invest should not be based upon such figures. The investment may be more or less diversified and/or volatile than the referenced indices, and the referenced indices may reflect positions that are not within the Legacy Bridge Core Equity. An index is a portfolio of specific securities, the performance of which is often used as a benchmark in judging the relative performance of certain investments. Indices are unmanaged portfolios and investors cannot invest directly in an index. The index returns are "total returns" with dividends reinvested, which means the return is not only the change in price for the securities in the index, but any income generated by those securities. The S&P 500 generally represents performance of 500 large companies listed on exchanges in the U. S. It is one of the most commonly followed equity indices.

Legacy Bridge Core Equity returns have not been verified by Morningstar. The Morningstar Peer Group Large Blend is assigned to portfolios where neither growth nor value characteristics predominate. These portfolios tend to invest across the spectrum of U.S. industries. Their returns are often similar to those of the S&P 500 Index. No compensation was paid by our Firm, directly or indirectly, in connection with obtaining or using the ranking. However, Legacy Bridge LLC does pay Morningstar for other services.

Small Cap Composite and Mid Cap Composite are available for review upon your request.

Advisory services offered through Legacy Bridge, LLC, an Investment Advisor registered with the U.S Securities and Exchange Commission.

Source: Morningstar Direct