

* INVEST %	SECTOR	CORPORATION	SIMBOL	*
50%	Communication	ANGI HOMESERVICES INC CLASS A	ANGI	
50%	Communication	MATCH GROUP INC	MTCH	
10%	Communication	NETFLIX INC	NFLX	
100%	Communication Services	Sohu.com Ltd ADR	SOHU	
50%	Communication Services	Yandex NV	YNDX	
100%	Consumer Discretionary	AMAZON COM INC	AMZN	
50%	Consumer Discretionary	ETSY INC	ETSY	
50%	Consumer Discretionary	Stamps.com Inc	STMP	
75%	Consumer Discretionary	TESLA INC	TSLA	
75%	Credit Services	PayPal Holdings, Inc.	PYPL	
50%	Education & Training Services	Chegg, Inc. (CHGG)	CHGG	
10%	Information Technology	ADOBE INC	ADBE	
10%	Information Technology	ALARM.COM HOLDINGS INC	ALRM	
50%	Information Technology	APPLE INC	AAPL	
25%	Information Technology	AVALARA INC	AVLR	
50%	Information Technology	CADENCE DESIGN SYSTEMS INC	CDNS	
10%	Information Technology	COUPA SOFTWARE INC	COUP	
50%	Information Technology	CREE INC	CREE	
50%	Information Technology	CROWDSTRIKE HOLDINGS INC CLASS A	CRWD	
25%	Information Technology	DATADOG INC CLASS A	DDOG	
25%	Information Technology	DOCUSIGN INC	DOCU	
100%	Information Technology	Endurance International Group Holdings Inc	EIGI	
75%	Information Technology	Fastly Inc	FSLY	
25%	Information Technology	NVIDIA CORP	NVDA	
10%	Information Technology	OKTA INC CLASS A	OKTA	
100%	Information Technology	QORVO INC	QRVO	
10%	Information Technology	SKYWORKS SOLUTIONS INC	SWKS	
50%	Information Technology	UNIVERSAL DISPLAY CORP	OLED	
100%	Insurance—Property & Casualty	Palomar Holdings, Inc.	PLMR	
50%	Internet Content & Information	Pinterest, Inc. (PINS)	PINS	
50%	Internet Retail	Carvana Co. (CVNA)	CVNA	
10%	Semiconductor Equipment & Materials	ASML Holding N.V.	ASML	
75%	Software—Infrastructure	Square, Inc. (SQ)	SQ	
50%	Solar	SunPower Corporation	SPWR	