

Top to Bottom Holdings by Performance as of 10/25/2024
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Securities Ranked Top to Bottom by Performance	Average Weight (%)	Security Contribution to Portfolio Return (%)
NVIDIA CORP	6.00	7.96
JPMORGAN CHASE & CO	4.24	2.31
AMAZON.COM INC	4.68	2.10
APPLE INC	5.59	2.05
META PLATFORMS INC-CLASS A	2.69	1.95
MICROSOFT CORP	5.30	1.62
PARKER HANNIFIN CORP	2.40	1.52
BLACKROCK INC	2.19	1.22
ECOLAB INC	2.14	1.21
SALESFORCE INC	2.77	1.14
ALPHABET INC-CL A	5.31	1.13
WASTE MANAGEMENT INC	2.38	1.02
VISA INC-CLASS A SHARES	3.97	0.90
STRYKER CORP	2.43	0.88
AUTODESK INC	2.15	0.86
PALO ALTO NETWORKS INC	1.94	0.86
BOOKING HOLDINGS INC	1.56	0.80
TJX COMPANIES INC	2.65	0.78
AMERICAN TOWER CORP	1.25	0.51
DANAHER CORP	1.76	0.47
ELI LILLY & CO	0.97	0.45
ABBOTT LABORATORIES	1.91	0.44
AMERICAN ELECTRIC POWER	1.30	0.39
WALT DISNEY CO/THE	1.83	0.39
PROCTER & GAMBLE CO/THE	2.12	0.36
TESLA INC	1.47	0.34
HONEYWELL INTERNATIONAL INC	1.83	0.33
CME GROUP INC	2.52	0.28
NEWMONT CORP	1.23	0.28
KEYSIGHT TECHNOLOGIES IN	0.64	0.27
JOHNSON & JOHNSON	2.11	0.23

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CHENIERE ENERGY INC	1.41	0.20
MONDELEZ INTERNATIONAL INC-A	1.86	0.20
ACCENTURE PLC-CL A	0.28	0.19
ZOETIS INC	1.59	0.18
ENPHASE ENERGY INC	0.08	0.10
PROLOGIS INC	0.58	0.10
CONSTELLATION BRANDS INC-A	1.01	0.06
EATON CORP PLC	0.12	0.06
CVS HEALTH CORP	1.03	0.01
HERSHEY CO/THE	0.31	0.01
ADVANCED MICRO DEVICES	0.59	-0.01
CHEVRON CORP	2.45	-0.03
WYNN RESORTS LTD	0.06	-0.05
UNITED PARCEL SERVICE-CL B	1.43	-0.08
ALBEMARLE CORP	0.09	-0.12
ADOBE INC	2.96	-0.23
BOEING CO/THE	2.10	-0.28
ESTEE LAUDER COMPANIES-CL A	0.70	-0.56

*As of 10/25/2024, Meta Platforms Inc. ranked 5th with an average weight of 2.69% and a contribution to return of 1.95%. Microsoft Corp. ranked 6th with an average weight of 5.30% and a contribution to return of 1.62%. Alphabet Inc. ranked 11th with an average weight of 5.31% and a contribution to return of 1.13%.

Past performance is not indicative of future results. It should not be assumed that the recommendations made in the future will be profitable or will equal the performance of the securities listed above. The performance information shown above has been calculated using a representative client account managed according to the firm's core stock portfolio. Information on the methodology used to calculate the performance information and a list reflecting the contribution of all the holdings in the representative account to the account's overall performance during the time period reflected above, is available upon request. Specific securities transactions for the preceding 12 months are available upon request. Holdings are subject to change. Sand Hill Global Advisors or one or more of its employees, may have a position in the securities discussed herein and may purchase or sell such securities from time to time.