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Zacks' 16 Equity Sectors & Asset Classes Where (and Why) Have Returns Been Strong?

Part One: **The 16 Zacks Sector Equity Returns**

Part Two: **Other Asset Class Returns**

Presented by:

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Zacks Classification System: We use 16 sectors and 7 asset classes.

For Sectors (Equities) and other asset class ETFs

Zacks Classification Tables for Sectors (Equities) and ETFs Asset Class Type

Zacks Sector Classification			
Codes	Names	Codes	Names
ZS1M	Consumer Staples	ZS9M	Conglomerates
ZS2M	Consumer Discretionary	ZS10M	Computer & Technology
ZS3M	Retail - Wholesale	ZS11M	Aerospace
ZS4M	Medical	ZS12M	Oils - Energy
ZS5M	Autos, Tires and Trucks	ZS13M	Finance
ZS6M	Basic Materials	ZS14M	Utilities
ZS7M	Industrial Products	ZS15M	Transportation
ZS8M	Construction	ZS16M	Business Services

Codes	Zacks Classification of ETFs Asset Class Types
1	Balanced
2	Commodities
3	Currency
4	Equities
5	Fixed Income
6	Alternatives
7	Volatility

Source : Zacks Investment Research

What Zacks Sectors Look Good?

Zacks Sector Equity Returns

Zacks uses 16 sectors. Lots of smaller companies get included
S&P uses 11 sectors. Just large market cap companies included.

Here are the 2025 Yearly Returns for Eight Zacks Sectors

Plus 2026 YTD Returns...

Yearly Rts. in %, Mkt Cap % Change in 2025 & YTD Rts. in %, YTD Mkt Cap % Change in 2026 Of Top 10 Stocks from each 8 Zacks Sectors - Chart 1																			
Consumer Staples					Consumer Discretionary					Retail - Wholesale					Transportation				
Ticker	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Ticker	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Ticker	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026
TDUP	359.71	382.97	-26.45	-24.56	WBD	172.66	174.09	-2.88	-2.81	W	126.56	142.81	-17.95	-19.40	LTM	103.07	96.58	10.55	10.58
EYE	147.79	166.78	9.30	0.79	SPHR	135.81	142.07	21.69	23.84	CVNA	107.52	108.80	-18.76	-21.80	GSL	73.24	60.30	8.88	10.19
SEB	83.43	79.01	20.90	22.98	FUBO	100.00	101.37	-46.83	-47.96	TPR	98.65	75.05	20.37	15.89	RYAAY	67.87	62.48	-8.87	-11.16
TPB	81.04	91.47	21.56	23.94	SGHC	94.95	95.41	-22.96	-24.83	HLF	92.68	103.93	23.35	19.28	OMAB	65.17	62.16	17.82	13.58
CELH	73.65	88.98	-2.32	-2.00	LAUR	84.09	84.35	3.27	1.22	FIGS	83.52	99.18	-9.77	-13.21	CMRE	63.86	25.46	8.02	7.74
BTI	65.62	46.08	5.09	3.78	APEI	75.24	78.11	17.96	19.00	DG	79.74	81.79	16.35	11.61	FRO	61.44	55.79	41.71	41.78
MNST	45.87	47.80	6.27	5.39	GTN.A	70.01	48.33	2.79	25.74	FIVE	79.46	74.41	9.33	8.45	CAR	59.19	63.23	-7.77	-10.28
SCHL	44.00	25.11	15.71	15.87	GTN	64.13	67.91	-3.10	-4.87	BABA	75.89	79.54	6.24	2.35	CHRW	58.91	58.37	9.49	6.91
COCO	43.62	47.95	6.73	5.64	VIK	62.07	69.59	5.34	2.58	AEO	64.40	41.31	-2.86	-3.34	NAT	54.96	40.83	31.98	32.31
NUS	43.22	42.75	-13.10	-15.04	RL	55.02	52.82	4.40	3.09	DLTR	64.15	50.87	2.48	1.70	AER	51.60	43.08	4.64	-7.17
Auto-Tires-Trucks					Basic Materials					Construction					Business Services				
Ticker	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Ticker	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Ticker	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026
CYD	280.76	224.48	51.01	49.25	TMC	450.89	652.45	-1.30	-10.70	TPC	177.19	191.87	23.46	19.81	CIFR	218.11	255.04	11.25	8.09
AEVA	179.58	209.02	2.26	2.72	USAS	443.76	794.25	47.36	22.14	AGX	130.55	132.45	31.03	26.08	AMPX	181.79	291.03	26.36	20.56
DAN	110.13	64.41	40.53	39.77	ARMN	363.71	467.59	20.09	16.58	FIX	120.86	121.08	43.36	38.82	WLDN	172.14	202.51	13.19	5.47
QS	100.77	103.41	-25.82	-29.21	SBSW	331.82	357.72	20.91	9.75	CX	106.04	110.92	9.40	4.92	DAVE	154.73	142.22	-19.93	-22.66
GTX	97.10	77.15	21.92	21.92	HL	291.64	330.05	17.77	11.88	DY	94.13	96.96	26.51	22.97	SYM	150.95	145.88	-7.65	-4.86
PSIX	92.07	142.45	72.86	50.82	AU	286.84	371.70	28.78	20.35	VSEC	82.21	109.27	17.35	12.91	NVRI	132.73	138.07	5.58	5.53
XPEV	71.57	64.53	-11.54	-13.67	DRD	264.63	286.66	14.96	6.96	STRL	81.79	83.52	42.95	38.29	ATGL	117.47	58.34	-16.87	-17.17
HSAI	62.08	77.79	14.96	14.34	LEU	264.45	290.68	-17.95	-21.67	PRIM	63.08	67.15	34.15	28.93	GCT	112.09	106.97	-10.31	-12.31
GM	54.17	29.82	-0.30	-5.41	NGD	251.21	275.08	26.98	18.56	MJZ	59.67	64.63	24.00	20.11	APP	108.08	111.79	-42.04	-45.32
OPLN	50.10	53.34	-4.97	-8.77	CNL	250.72	348.03	14.80	8.74	JCI	54.02	41.13	16.28	14.25	COHR	94.84	100.85	17.70	35.17

*Note : YTD Returns 2026 are from 12/31/25 to 02/13/26

Source : Zacks Investment Research

Zacks Equity Outperformers 1: Top Returns Tickers and Their Narratives.

For the first eight sectors we group...

- Consumer Staples: **ThredUp Inc. (TDUP)**. They provide resale platforms for women's and kids' apparel, shoes and accessories. ThredUp Inc. is based in Oakland, CA.
- Consumer Discretionary: **Warner Bros. Discovery (WBD)**.
- Retail Wholesale: **Wayfair (W)**.
- Transportation: **LATAM Airlines (LTM)**.
- Autos-Tires-Trucks: **China Yuchai International (CYD)**. They manufacture medium-duty diesel engines in China.
- Basic Materials: **The Metals Company (TMC)**. This is an explorer of battery metals from seafloor polymetallic nodules. TMC the metals company Inc., was formerly known as Sustainable Opportunities Acquisition Corporation. It is based in New York.
- Construction: **Tutor-Perini Corp. (TPC)**. This is a diversified general contractor.
- Business Services: **Cipher Mining (CIFR)**. This is an industrial-scale bitcoin mining company.

Here are the 2025 Yearly Returns for Eight Additional Zacks Sectors

Plus 2026 YTD Returns...

Yearly Rts. in %, Mkt Cap % Change in 2025 & YTD Rts. in %, YTD Mkt Cap % Change in 2026 Of Top 10 Stocks from each 8 Zacks Sectors - Chart 2																			
Industrial Products					Computer and Technology					Finance					Utilities				
Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026
EOSE	135.80	197.88	-3.14	-6.34	PL	388.12	367.27	13.69	15.80	IREN	284.63	565.54	11.78	4.77	ELPC	85.27	81.73	17.55	10.77
CECO	97.98	112.31	32.23	28.90	SATS	374.67	370.29	4.09	7.15	APLD	220.94	278.95	43.88	46.87	NRG	78.74	65.53	8.57	20.01
MYE	75.72	74.79	17.95	14.47	LITE	339.06	378.05	52.67	45.02	HOOD	203.54	207.77	-32.83	-35.69	SBS	77.14	75.02	22.85	19.62
ENS	60.29	51.01	22.11	18.50	SIFY	326.23	836.46	23.46	20.41	ASA	195.55	171.74	19.84	14.54	AXIA	74.04	57.42	22.38	24.28
CAT	60.21	54.88	35.45	32.80	VSAT	304.93	310.21	41.76	40.91	SAN	162.75	147.40	1.11	0.42	VIV	61.72	55.83	32.55	32.21
LIF	55.42	65.53	-23.12	-25.70	WDC	289.33	195.78	63.45	53.81	BBVA	149.74	138.91	-2.49	-1.81	BLDP	53.01	56.30	-15.35	-18.20
REZI	52.36	56.14	2.02	-0.45	OPEN	264.37	286.30	-23.76	-26.05	HRTG	141.82	142.97	-15.17	-14.41	AQN	49.98	38.34	10.73	10.02
AMBP	52.20	34.44	18.54	19.71	LASR	257.58	293.00	39.38	33.36	SII	137.07	139.08	25.80	22.59	MYRG	46.87	44.39	25.38	21.71
RBC	49.91	52.99	23.19	21.09	VISN	247.98	240.10	5.90	5.15	PGY	124.97	146.34	-40.53	-43.12	LUMN	46.33	41.57	7.98	9.10
POWL	44.54	48.42	83.53	72.36	ASTS	244.22	287.19	13.60	14.68	PPLT	124.48	226.73	0.30	-13.38					
Medical					Conglomerates					Aerospace					Oils-Energy				
Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026
RGC	16054.06	16309.81	48.67	47.54	CIB	124.16	103.99	21.05	17.77	ATRO	239.85	249.26	41.85	38.84	BE	291.22	381.28	60.82	55.24
ABVX	1742.25	2358.86	-7.32	-10.89	FBYD	87.76	213.40	-69.39	-72.92	KTOS	187.76	227.44	17.32	15.63	OKLO	238.01	332.11	-8.46	-14.60
SVA	850.08	0.00	0.00	0.05	GPGI	50.62	76.65	27.76	188.87	RKLB	173.89	174.83	-3.33	-4.54	TTI	161.73	174.70	16.76	17.12
PVLA	772.25	808.64	-22.10	-21.13	MMM	26.34	21.46	7.81	5.11	ESLT	124.90	121.93	17.09	18.45	NXT	138.46	149.88	33.67	27.62
CELC	661.96	820.70	4.78	2.21	ITT	22.53	30.90	17.06	14.12	ATI	108.50	100.89	25.42	23.07	PARR	114.40	94.37	21.97	22.40
GRAL	379.49	442.14	13.92	6.46	IAC	11.63	-17.23	-12.25	-14.44	HWM	87.94	87.93	22.11	18.13	CSIQ	113.76	115.09	-18.43	-19.78
COGT	355.38	547.46	2.84	-6.04	NPK	9.71	12.38	16.59	14.75	GE	85.70	82.10	2.40	-0.48	SEDG	112.13	127.70	23.15	16.70
ZBIO	343.34	454.64	-27.29	-37.87	GFF	4.16	1.67	27.09	24.81	HII	84.16	84.93	23.15	19.27	NGL	100.40	88.66	20.00	25.88
PRAX	282.98	368.65	7.64	18.84	HON	-6.35	-16.04	23.73	22.30	WWD	82.54	85.95	25.49	21.07	GEV	98.99	95.64	22.81	20.10
PGEN	273.21	591.98	17.94	18.49	CSL	-12.25	-18.14	27.88	23.83	TATT	73.91	117.29	10.14	8.15	RUN	98.92	114.73	3.75	-6.73

*Note : YTD Returns 2026 are from 12/31/25 to 02/13/26

Source : Zacks Investment Research

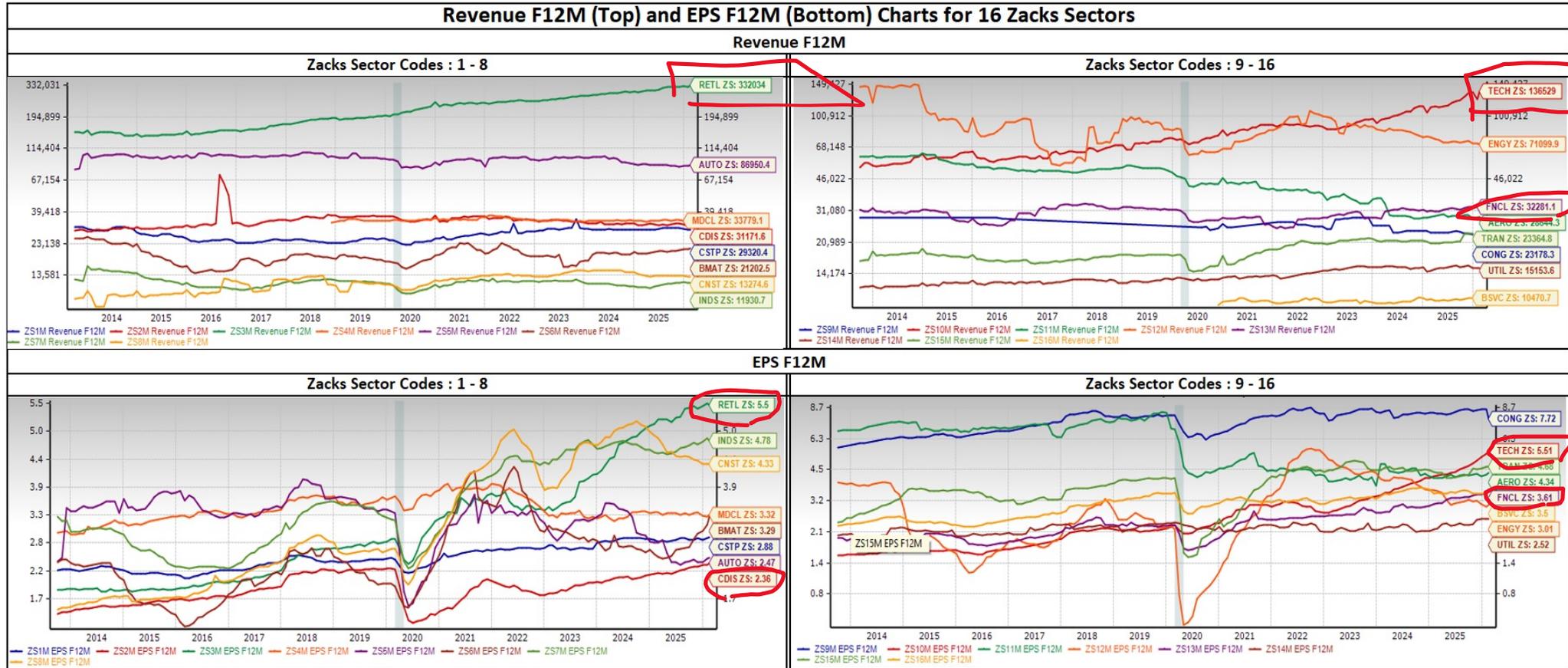
Zacks Equity Outperformers 2: Top Returns Tickers and Their Narratives.

For the eight additional sectors we group...

- Industrial Products: **Eos Energy Enterprises (EOSE)**. This is a manufacturer of zinc battery storage systems. Based in Edison, New Jersey (interesting spot, eh?).
- Computers and Technology: **Planet Labs (PL)**. A provider of global, daily satellite imagery and geospatial solutions. It offer mission-critical data, advanced insights, and software solutions principally to agriculture, forestry, intelligence, education and finance companies. Planet Labs Inc., formerly known as dMY Technology Group Inc. IV, is based in San Francisco, CA.
- Finance: **IREN Limited (IREN)**. Owns and operates data centers, powered by renewable energy. Its facilities are optimized for Bitcoin mining, artificial intelligence cloud services and other power-dense compute. IREN Limited, formerly known as Iris Energy Limited, is based in Australia.
- Utilities: **Companhia Paranaense de Energia - Copel Unsponsored ADR (ELPC)**. Founded in 1954, Copel is a major Brazilian utility company (electric power and, formerly, telecom/gas) headquartered in Curitiba, serving millions of customers in the state of Paraná and parts of Santa Catarina.
- Medical: **Regencell Bioscience (RGC)**. This is an early-stage bioscience company which focuses on research, development and commercialization of Traditional Chinese Medicine for the treatment of neurocognitive disorders and degeneration, specifically Attention Deficit Hyperactivity Disorder and Autism Spectrum Disorder. Regencell Bioscience Holdings Limited is based in Hong Kong.
- Conglomerates: **Grupo Cibest S.A. (CIB)**. This company operates as a holding company, through its subsidiaries, provides a range of financial products and services. It serves diversified individual, corporate, institutional and government customer base throughout Colombia, Latin America and the Caribbean region. Formerly known as Bancolombia S.A., is based in Medellin, Colombia.
- Aerospace: **Astronics(ATRO)**. Astronics Corporation is a manufacturer of specialized lighting and electronics for the cockpit, cabin and exteriors of military, commercial transport and private business jet aircraft.
- Oils-Energy: **Bloom Energy (BE)**. This company generates and distributes renewable energy. It supplies electricity to the residential, commercial and industrial sectors. Based in CA, United States.

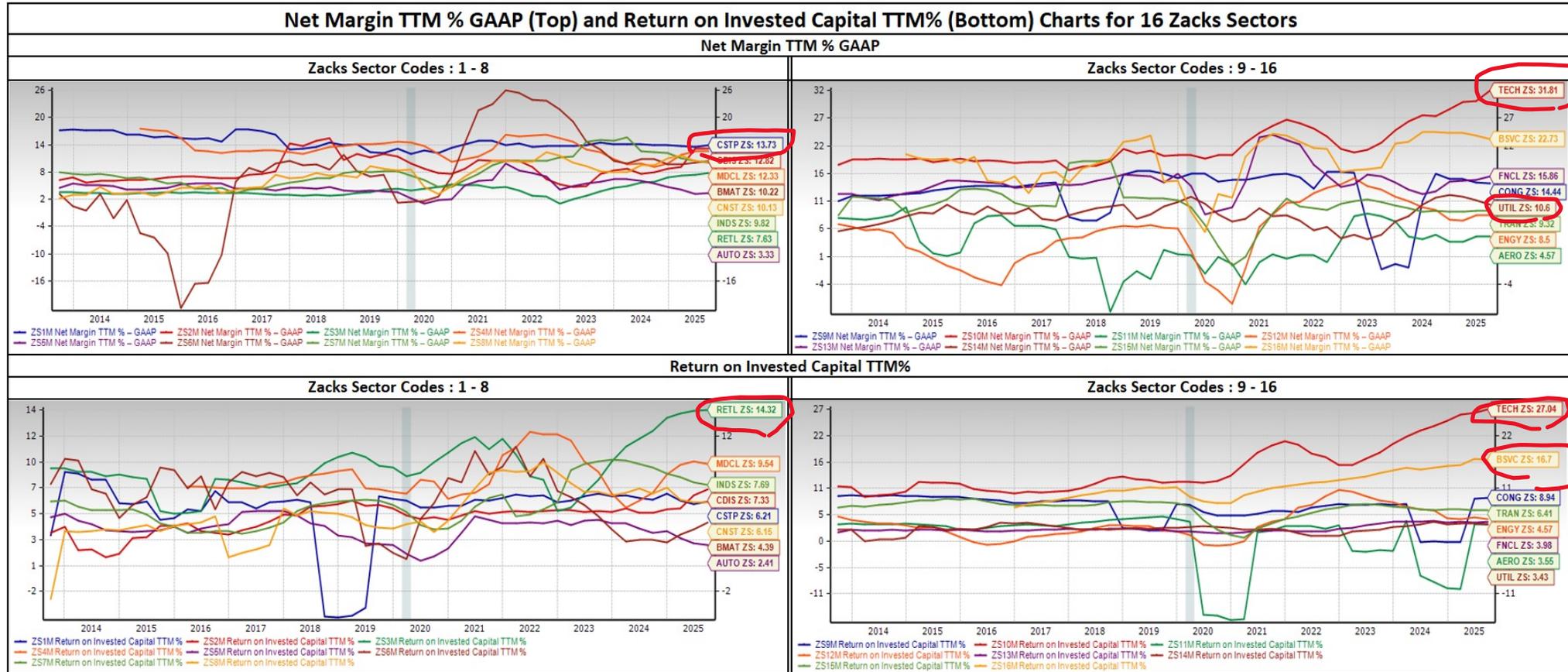
The 16 Zacks Sectors: Revenue F12M (top) and EPS F12M (bottom)

From 2014 to 2026 YTD



The 16 Zacks Sectors: Net Margin (top) and Return on Invested Capital

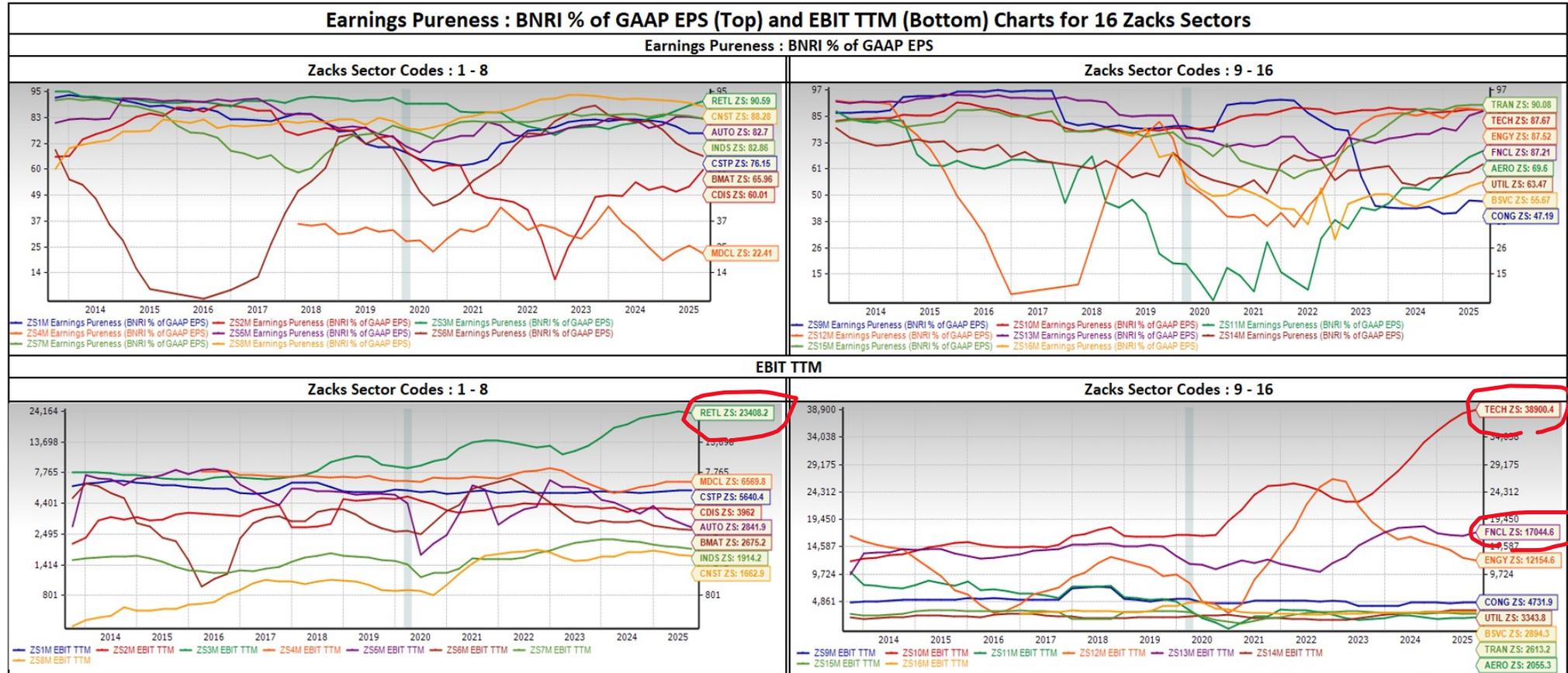
From 2014 to YTD 2026



Source : Zacks Investment Research

The 16 Zacks Equity Sectors: Earnings Purenness. Income BNRI and EBIT

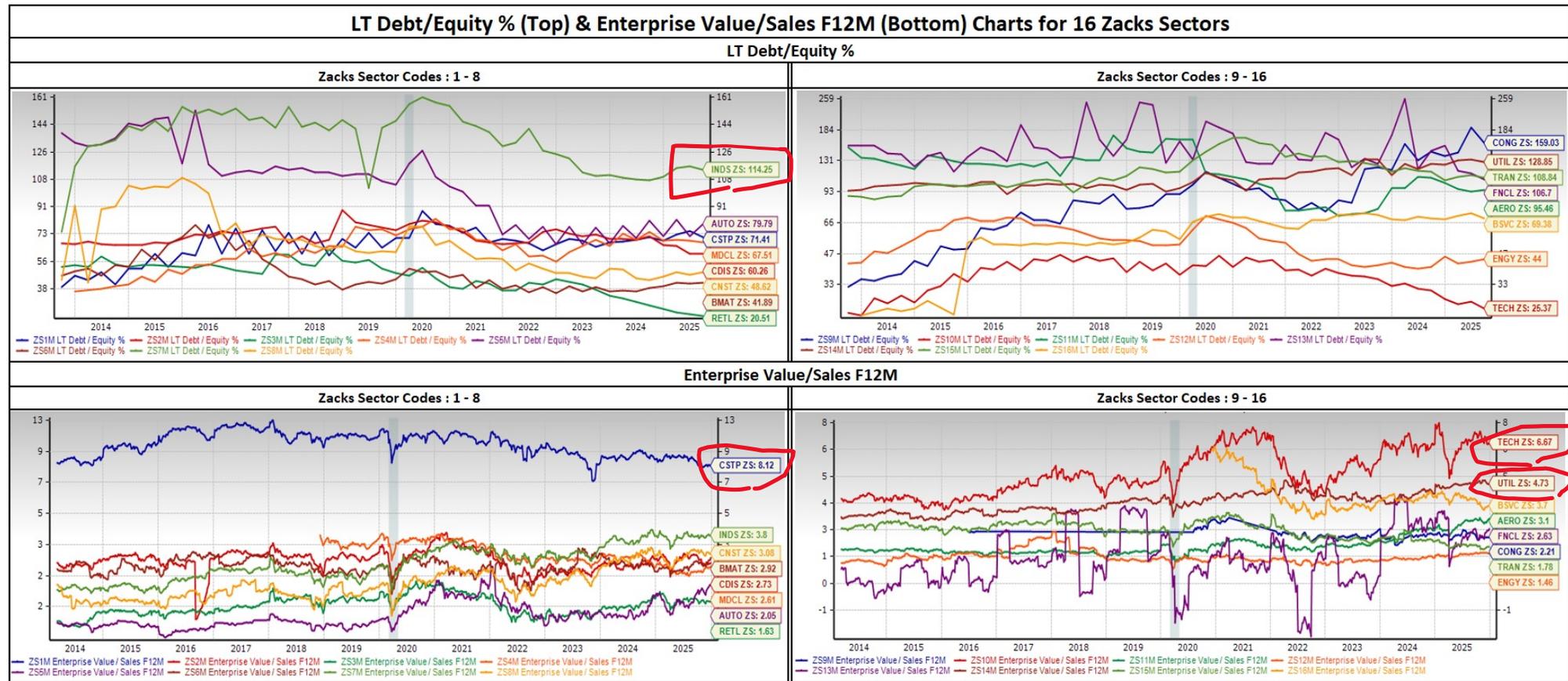
Income Before Non-Recurring Items (BNRI) and Earnings Before Income Taxes (EBIT), from 2014 to YTD 2026



Source : Zacks Investment Research

The 16 Zacks Sectors: Long Term Debt/Equity (top) and Enterprise Value/Sales (bottom)

From 2014 to YTD 2026



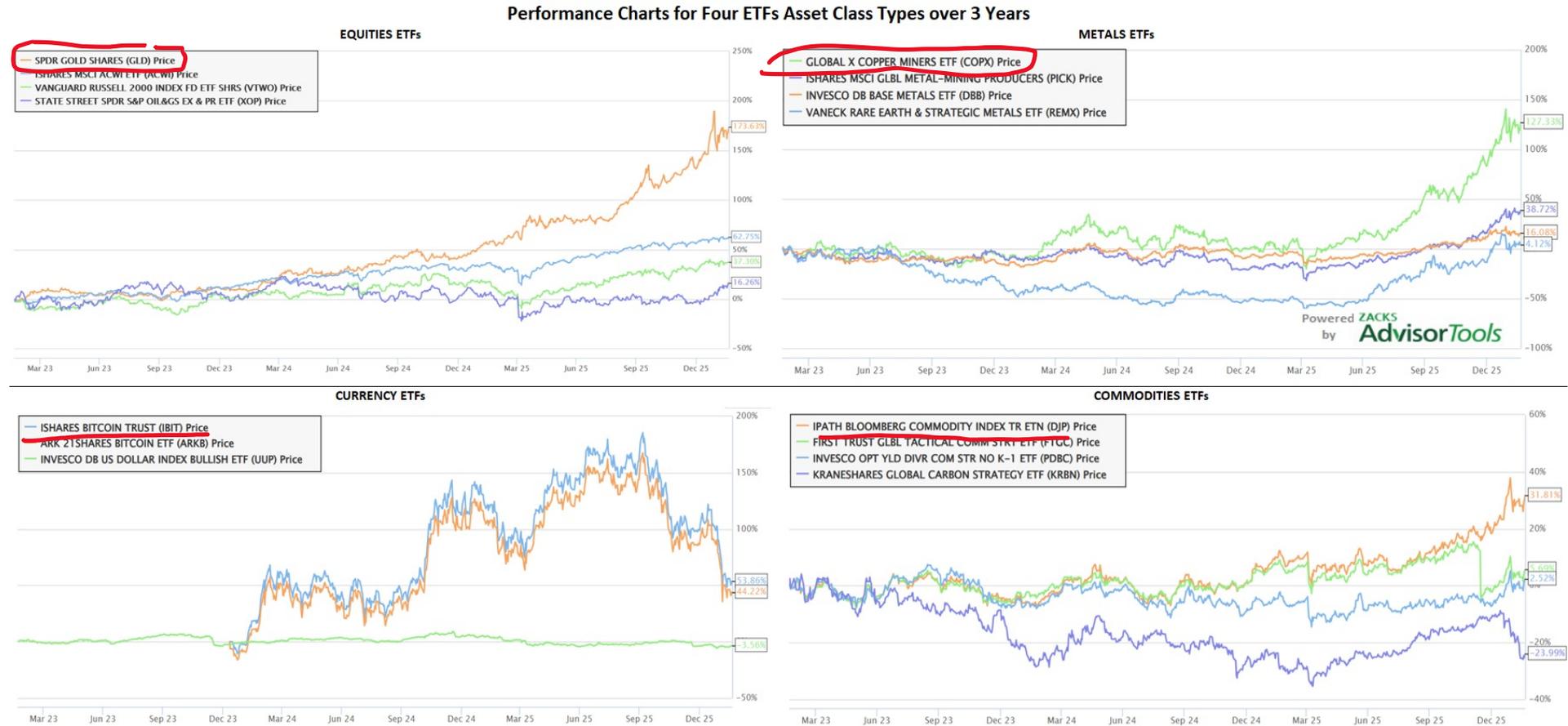
Source : Zacks Investment Research

This is useful information for traders and investors

Other Asset Class Returns

Performance Charts for Four ETF Asset Class Types

Performance is shown, over the last three years: *Equities, Metals, Currencies, and Commodities*



Yearly 2025 Returns for Seven Asset Classes

Classified into *Balanced, Commodities, Currency, Equities* (top) and *Fixed Income, Alternatives, and Volatility* (bottom)

Yearly Rts. in %, Mkt Cap % Change in 2025 & YTD Rts. in %, YTD Mkt Cap % Change in 2026 for Top 10 ETFs from each of the Seven Zacks Asset Class Types																			
Balanced					Commodities					Currency					Equities				
Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026
GNT	52.33	29.11	11.81	16.78	AGQ	360.71	357.84	-33.33	-11.73	WGMI	72.46	51.61	4.00	6.32	GD XU	796.47	2439.99	16.26	43.32
HGLB	51.24	38.24	-3.66	-1.53	SHNY	214.54	214.54	20.51	38.40	DECO	42.53	51.74	4.79	10.03	MUU	594.13	3982.60	92.57	96.33
GLU	37.71	-27.96	8.89	10.55	SIVR	145.34	275.35	-1.93	10.27	STCE	36.55	128.42	-7.94	-5.45	MULL	558.51	5001.94	90.07	94.12
ETG	36.72	26.49	1.35	-0.52	PSLV	145.08	189.59	-3.80	9.18	BKCH	27.21	73.38	-4.22	-0.83	JNUG	478.10	124.41	15.26	35.59
GGZ	34.79	18.06	9.17	10.33	SLV	144.67	171.90	-1.97	10.23	IBLC	27.21	102.89	-8.64	-5.52	KORU	432.02	201.75	156.47	151.97
BTGD	34.61	248.47	-18.20	-13.91	DGP	141.40	141.40	20.73	31.68	HECO	26.23	-47.61	7.12	11.42	NUGT	425.02	120.73	21.37	38.38
ACV	33.45	19.83	1.38	2.21	UGL	137.57	239.26	17.59	29.12	ULE	25.97	39.97	1.16	0.13	GDMN	236.86	1457.81	18.87	31.19
BCV	33.19	24.56	5.46	5.48	DZZ	132.78	132.78	-25.00	-32.68	FDIG	19.93	49.32	-9.78	-7.74	PLTU	226.72	1292.75	-54.71	-46.15
GUT	33.08	42.49	2.15	0.83	PPLT	124.48	202.15	-15.06	1.08	BITQ	18.00	106.96	-6.03	-3.21	PTIR	223.41	175.04	-56.75	-45.94
BXSY	32.18	23.58	4.26	3.91	PLTM	124.46	477.78	-15.01	0.91	BITS	14.80	-11.98	-27.86	-12.26	SLVP	202.63	412.18	14.65	22.21
Fixed Income					Alternatives					Volatility					Notes : 1. Returns (%) : Total Returns = Price Change + Dividends 2. YTD Returns 2026 are from 12/31/25 to 02/13/26 Source : Zacks Investment Research				
Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026	Tickers	Yearly Rts. in % : 2025	Mkt Cap % Change : 2025	YTD Rts. in % : 2026	YTD Mkt Cap % Change : 2026					
GOLY	57.96	1214.42	4.33	8.96	GDE	73.77	1081.41	7.21	13.34	TPIF	34.26	82.01	8.64	82.01					
TEI	44.96	25.73	9.96	6.98	SOXY	36.68	320.31	13.37	14.25	SVXY	10.63	0.94	-5.31	0.94					
EDD	32.49	19.60	11.17	12.34	NTSE	36.27	52.30	13.76	13.62	TPSC	7.35	47.69	7.02	47.69					
EMD	23.28	9.91	5.42	5.93	DRAI	33.69	72.41	-2.96	-1.06	VXZ	5.73	5.73	2.97	5.73					
EDF	21.91	88.26	6.97	5.63	OVF	33.02	107.84	9.05	8.95	VIXM	5.60	139.32	2.78	139.32					
ELD	21.78	47.95	4.08	2.05	CLIX	32.82	-15.31	-16.73	-13.74	SVOL	2.32	-44.20	-2.32	-44.20					
FEMB	21.74	139.83	3.89	3.15	NTSI	30.34	36.56	7.46	7.51	SVIX	-4.49	-18.10	-11.92	-18.10					
RLY	20.28	34.23	8.14	12.11	PPI	30.06	73.39	10.74	14.16	ZVOL	-10.41	-35.11	-2.68	-35.11					
FCVT	19.58	5.73	5.58	7.33	MOOD	29.87	374.83	6.50	9.97	VXX	-42.21	-42.21	8.45	-42.21					
EMLC	18.73	81.95	2.35	2.17	CVRT	29.33	58.77	9.93	13.04	VIXY	-43.05	11.13	8.30	11.13					

Zacks Equity Outperformers 2: Top Returns Tickers and Their Narratives.

For the eight additional sectors we grouped...

- **Balanced: GAMCO Natural Resources Gold and Income Trust (GNT).**
- **Commodities: Proshares Ultra Silver (AGQ).**
- **Currency: Coinshares Bitcoin Mining ETF (WGMI).**
- **Equities: MicroSectors Gold Miners 3X Leveraged ETNs (GDXU).**
- **Alternatives: WisdomTree Efficient Gold Plus Equity Strategy Fund (GDE).**
- **Volatility: Timothy Plan International ETF (TPIF).**

The Timothy Plan International ETF

Started in 2019. This is a very interesting ETF strategy to learn more about....

The Timothy Plan International ETF (Ticker: TPIF) is a "Biblically Responsible" exchange-traded fund that invests in large-cap companies outside of the United States. It is designed for investors who want international stock exposure but wish to avoid companies whose business practices conflict with traditional Christian values.

1. The Core Strategy: Biblically Responsible Investing (BRI)

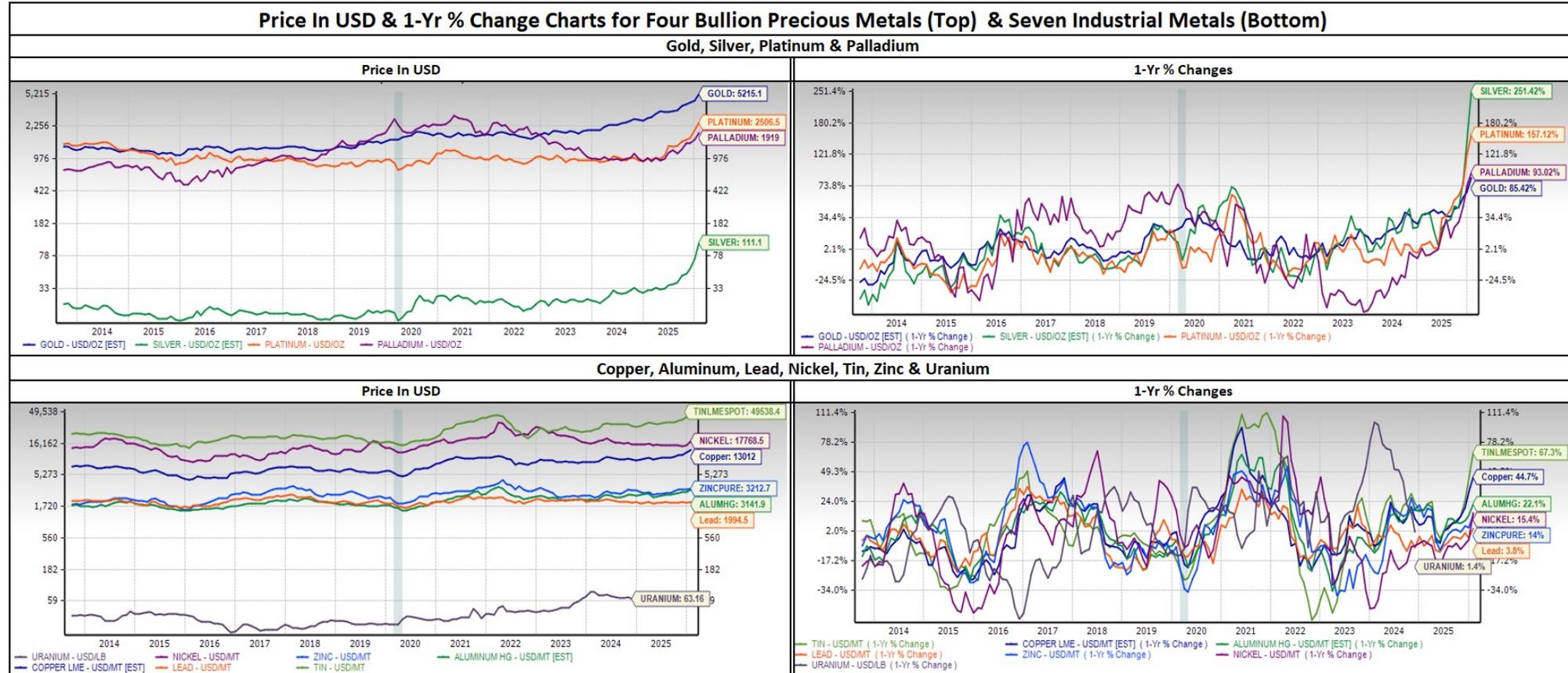
- The defining feature of this ETF is its moral filtering. Timothy Plan uses a strict screening process to exclude companies involved in:
 - Abortion & Pro-Life Issues: Companies that perform or fund abortions or manufacture abortifacients.
 - Lifestyle & Entertainment: Businesses involved in pornography or those that actively promote "alternative lifestyles" contrary to the fund's biblical standards.
 - Addictive Behaviors: Companies that profit from alcohol, tobacco, or gambling.
 - Human Rights: Companies involved in child labor or those that support terrorist-sponsoring nations.

2. How It Invests (Smart Beta)

- Unlike most international ETFs that weight companies by their size (market cap), TPIF uses a "Smart Beta" volatility-weighting strategy.
- Index Tracked: It follows the Victory International Volatility Weighted BRI Index.
- The Goal: **By weighting stocks based on their price stability (volatility) rather than their size, the fund aims to provide a smoother ride with less "downside" during market turbulence.**
- Holdings: It typically holds around 350–500 stocks from developed markets such as Japan, the UK, Canada, France, and Switzerland.

Price in USD Change -- for 4 Precious Metals and 7 Industrial Metals.

From 2024 to YTD 2026



Source : Zacks Investment Research

Tables with Moody's and Fitch's Debt Rating Scales

Plus Description, Scope/Meaning, and Scope of Application – then Examples of U.S. Companies.

Tables with Moody's and Fitch's Debt Rating Scale, Description, Scope of Application and Example Companies

Moody's Investors Service Scale			
Rating	Description	Scope/Meaning	Example of US Companies Issuing Debt & Rated as
Aaa	Highest Quality; Minimal Credit Risk. Obligations Judged to Be of The Highest Quality.	Exceptional Stability; Akin to Gilt-Edged Securities. Rare, for Entities with Enduring Strength.	Johnson & Johnson (JNJ) — Historically Aaa (or equivalent top tier), Microsoft (MSFT) — often Aaa/near-Aaa.
Aa1 / Aa2 / Aa3	High Quality; Very Low Credit Risk. Subject to Very Low Credit Risk.	Strong but Slightly More Susceptible than Aaa. The Numbers Indicate Ranking (1 Highest, 3 Lowest In Category).	Apple Inc. (AAPL) — typically Aa range, Berkshire Hathaway (BRK.A/BRK.B) — Aa.
A1 / A2 / A3	Upper-Medium Grade; Low Credit Risk.	Adequate Protection but could Be Affected By Economic Adversity.	Amazon.com Inc. (AMZN) — A range, Alphabet Inc. (GOOGL) — A.
Baa1 / Baa2 / Baa3	Medium-Grade; Moderate Credit Risk.	Speculative Elements Present; Lowest Investment-Grade. Vulnerable to Prolonged Downturns.	ford Motor Co. (F) — Baa range, many large Industrials/Utilities.
Ba1 / Ba2 / Ba3	Speculative; Substantial Credit Risk.	Judged to have Speculative Elements; Not Well Safeguarded.	High-Yield Issuers (e.g., Mid-tier Energy/Telecom in B).
B1 / B2 / B3	Highly Speculative; High Credit Risk.	Generally Lack Desirable Characteristics; Poor Protection.	Leveraged/High-Yield companies (e.g., cyclical sectors in B).
Caa1 / Caa2 / Caa3	Poor Standing; Very High Credit Risk.	Highly Speculative; often In Default or Near Default.	Distressed Issuers (e.g., vulnerable Retail/Energy).
Ca	Highly Speculative; Typically In Default.	Little Prospect for Recovery of Principal or Interest.	Near-Default or in Bankruptcy.
C	Lowest Rated; Typically In Default with Little Prospect for Recovery.	Worst-Case Default Scenario.	Active Default cases.

<https://www.moodys.com/>

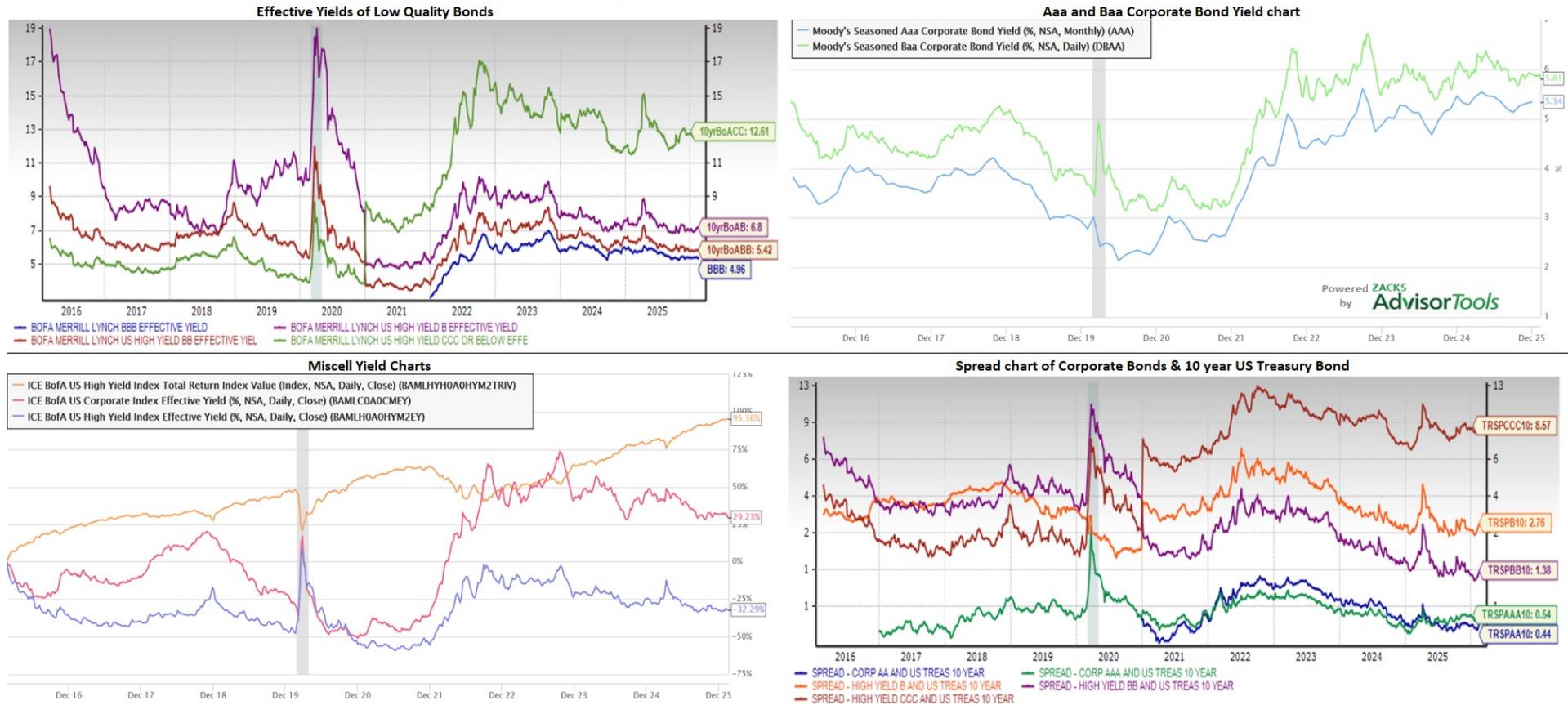
Fitch Ratings Scale			
Rating	Description	Scope/Meaning	Example of US Companies Issuing Debt & Rated as
AAA	Highest Credit Quality; Lowest Expectation of Default Risk.	Exceptional Capacity; Stable Even In Severe Downturns.	Johnson & Johnson (JNJ) — top-tier AAA (rare), Microsoft (MSFT) — AAA equivalent.
AA+ / AA / AA-	Very High Credit Quality; Very Low Default Risk.	Very Strong, with Minimal Differences From Aaa.	Apple Inc. (AAPL) — High-AA, Berkshire Hathaway (BRK.A/BRK.B) — AA.
A+ / A / A-	High Credit Quality; Low Default Risk.	Strong, but More Variable than Higher Ratings.	Amazon.com Inc. (AMZN) — A+, Alphabet Inc. (GOOGL) — A range.
BBB+ / BBB / BBB-	Good Credit Quality; Low Default Risk Currently, but Sensitive to Changes.	Adequate, but Adverse Conditions could lead to Deterioration.	Williams Companies (WMB) — BBB+, ford Motor Co. (F) — BBB range.
BB+ / BB / BB-	Speculative; Elevated Default Risk.	Material Default Risk, but some Margin of Safety.	High-Yield Issuers (e.g., Leveraged mid-tier firms).
B+ / B / B-	Highly Speculative; High Default Risk.	Significant Risk; Limited Margin of Safety.	Cyclical/High-leverage companies in B.
CCC+ / CCC / CCC-	Substantial Credit Risk; Default Is A Real Possibility.	Dependence on Favorable Conditions.	Vulnerable/Distressed Issuers.
CC	Very High Levels of Credit Risk; Default Probable.	Near-Term Default Likely.	Imminent Default scenarios.
C	Exceptionally High Credit Risk; Default imminent.	In or Approaching Default.	Active distress.
RD	Restricted Default; Default on some but Not All Obligations.	Selective Default.	Partial Default cases.
D	Default; Failure on Obligations.	Full Default.	Defaulted Issuers.

<https://www.fitchratings.com/>

Effective Yield, Spread, and Return Charts for U.S. Corporate Bonds

From 2016 to YTD 2026

Effective Yield, Spread and Return Charts for US Corporate Bonds



Thank You for Attending!

John Blank, PhD

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