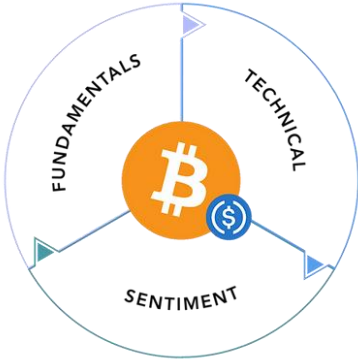


Overview (Trend)

Momentum Bitcoin ("Mom. BTC")



About: Trend-based and risk-managed Bitcoin investment strategy that aims to create a probabilistic advantage in low-frequency BTC/USD trading using a range of different indicators and time frames.



Strategy Drivers

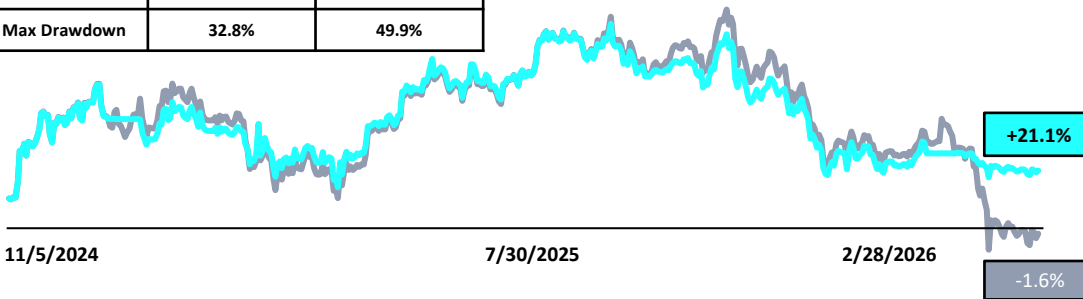
- 1 Time-Based Trend Indicators
- 4 Leverage Heat Map
- 2 Valuation Z Score Indicators
- 5 Open Interest Movements
- 3 Fed and Global Liquidity

Performance Data (As of 3/31/26)

Mom. BTC vs. BTC HODL

■ Momentum Bitcoin ■ Bitcoin (HODL)

	Mom. Bitcoin	Bitcoin (HODL)
Volatility	37.1%	46.6%
Sharpe	0.30	-0.10
Max Drawdown	32.8%	49.9%



YoY

	Reference Inception	3M	YTD	2023	2024	2025	Since Inception
Mom. BTC	11/5/2024	-1.1%	-2.4%	-	+39.8%	-12.4%	+21.1%
HODL BTC	11/5/2024	-22.0%	-23.1%	+153.6%	+34.9%	-6.4%	-1.6%

MoM

	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26
Mom. BTC	+8.1%	+8.4%	+0.5%	+9.4%	-4.5%	+1.3%	-8.1%	-15.9%	+1.3%	-0.7%	-1.9%	+1.2%
HODL BTC	+10.6%	+8.6%	+1.3%	+9.6%	-4.4%	+4.5%	-7.5%	-17.8%	+1.4%	-11.3%	-12.9%	+3.8%

Disclaimer

The performance data quoted represents past performance, which does not guarantee future results. **Returns are inclusive of Khelp's 2.0% management fee, which is based upon assets under management, calculated daily.** Performance is not representative of any one specific account managed by Khelp. Investment returns and the principal value of an investment will fluctuate; 3rd party fees are not included and may vary based on selected custodian. Availability of certain crypto assets may vary by custodian. Performance and access to specific assets are subject to change based on the custodian utilized. This fact sheet contains manually entered assets, is for informational purposes only, and is being furnished on a confidential basis; the info is not representative of any guaranteed or future performance. This fact sheet does not constitute an offer to sell or a solicitation of an offer to buy interests in any jurisdiction or to any person to whom it is unlawful to make such offer or solicitation in such jurisdiction. An offering to buy is made only pursuant to an Investment Advisory Agreement and will only be made to investors that are eligible to invest. Before making any investment decisions, individuals should consult their own advisors, including legal and tax advisor. While the information provided herein is believed to be accurate and reliable, none of Khelp, or any of their respective affiliates or representatives or any other person makes any representations or warranties, express or implied, as to the accuracy or completeness of such info. Data sourced from third party data provider, Artemis.xyz.

About

Khelp Investment Details

Min. Investment: \$10,000
Management Fee: 2.0%
Lock-Up: None
Trading Cadence: Model-Based

Reasons to Invest

A risk-managed Bitcoin strategy designed to enhance a traditional buy-and-hold approach by adjusting Bitcoin exposure based on momentum signals, trend shifts, and overbought or oversold conditions.

Structure

Unlike a pooled fund, portfolios include direct ownership through separately managed accounts, providing investors with the look and feel of a traditional brokerage environment.

Account Types

Khelp supports individual, joint, business, trust, and IRA account structures.

Counterparties

Custodian(s): Gemini, Anchorage
Management Platform(s): Anchorage Wealth

Bio



Boomer Saraga

Founder and Investment Manager
 B.A., Tufts University
boomer.saraga@khelpfinancial.com

As a crypto native since 2017, my goal is to provide investors with high quality exposure to actively managed, crypto investment strategies using a fundamental and quantitative approach.

Outside of Khelp, Boomer is a Managing Director at the Tie Capital, and holds his Series 24, 7, 63, 65, and 79 licenses. Boomer graduated from Tufts University.

Prior: SunTrust Robinson Humphrey/Truist Securities