

Top to Bottom Holdings by Performance as of 5/27/2021
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Securities Ranked Top to Bottom by Performance	Average Weight (%)	Security Contribution to Portfolio Return (%)
ALPHABET INC-CL A	4.54	2.77
APPLE INC	4.44	2.72
AMAZON.COM INC	6.07	2.41
UNITED PARCEL SERVICE-CL B	2.52	2.30
JPMORGAN CHASE & CO	3.42	2.15
NVIDIA CORP	2.93	2.00
PARKER HANNIFIN CORP	2.43	1.53
MICROSOFT CORP	3.93	1.51
BLACKROCK INC	2.43	1.51
DANAHER CORP	2.64	1.49
PAYPAL HOLDINGS INC	1.98	1.39
WASTE MANAGEMENT INC	3.47	1.36
WALT DISNEY CO/THE	2.73	1.25
HONEYWELL INTERNATIONAL INC	2.10	1.16
FACEBOOK INC-CLASS A	2.56	1.14
SHERWIN-WILLIAMS CO/THE	2.35	1.10
GENERAL ELECTRIC CO	1.24	1.05
CHUBB LTD	2.44	1.01
SALESFORCE.COM INC	3.15	0.94
CME GROUP INC	2.88	0.87
BOOKING HOLDINGS INC	1.83	0.86
VISA INC-CLASS A SHARES	4.09	0.84
CVS HEALTH CORP	2.11	0.76
ABBOTT LABORATORIES	2.33	0.70
BOEING CO/THE	0.85	0.62
MONDELEZ INTERNATIONAL INC-A	1.85	0.56
KEYSIGHT TECHNOLOGIES IN	1.42	0.55
HERSHEY CO/THE	1.40	0.49
JOHNSON & JOHNSON	2.39	0.49
PROCTER & GAMBLE CO/THE	2.00	0.49
CONSTELLATION BRANDS INC-A	1.35	0.47

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TJX COMPANIES INC	2.04	0.46
CHEVRON CORP	1.82	0.34
FIDELITY NATIONAL INFO SERV	2.06	0.33
ECOLAB INC	2.57	0.13
AMERICAN TOWER CORP	0.38	0.11
PFIZER INC	2.06	0.09
STRYKER CORP	0.32	0.07
AT&T INC	2.23	0.02
MERCK & CO. INC.	1.00	0.02
VIATRIS INC	0.00	0.01
FIDELITY GOVT CASH RESERVES	0.32	0.00
3M CO	0.14	-0.07
INTEL CORP	2.23	-0.23
AFFIRM HOLDINGS INC	0.06	-0.28
GILEAD SCIENCES INC	1.42	-0.30

*As of 5/27/2021, Alphabet Inc. Ranked 1st with an average weight of 4.54% and a contribution to return of 2.77%, Apple Inc. ranked 2nd with an average weight of 4.44% and a contribution to return of 2.72%. Amazon.com Inc. ranked 3rd with an average weight of 6.07% and a contribution to return of 2.41%, Microsoft Corp. ranked 8th with average weight of 3.93% and a contribution to return of 1.51%, and Facebook Inc. ranked 15th with an average weight of 2.56 and a contribution to return of 1.14%.

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.