

Top to Bottom Holdings by Performance as of 7/26/2021
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Securities Ranked Top to Bottom by Performance	Average Weight (%)	Security Contribution to Portfolio Return (%)
ALPHABET INC-CL A	4.58	3.19
APPLE INC	4.33	2.72
NVIDIA CORP	3.15	2.40
JPMORGAN CHASE & CO	3.55	1.88
UNITED PARCEL SERVICE-CL B	2.56	1.79
MICROSOFT CORP	3.90	1.72
PARKER HANNIFIN CORP	2.48	1.54
FACEBOOK INC-CLASS A	2.52	1.47
WASTE MANAGEMENT INC	3.49	1.42
AMAZON.COM INC	5.68	1.37
WALT DISNEY CO/THE	2.71	1.34
PAYPAL HOLDINGS INC	1.92	1.31
BLACKROCK INC	2.46	1.30
VISA INC-CLASS A SHARES	4.05	1.26
DANAHER CORP	2.58	1.22
HONEYWELL INTERNATIONAL INC	2.11	1.12
SALESFORCE.COM INC	3.06	0.98
GENERAL ELECTRIC CO	1.32	0.93
SHERWIN-WILLIAMS CO/THE	2.34	0.93
CME GROUP INC	2.93	0.89
KEYSIGHT TECHNOLOGIES IN	1.50	0.87
CVS HEALTH CORP	2.12	0.75
CHUBB LTD	2.44	0.71
BOOKING HOLDINGS INC	2.00	0.64
TJX COMPANIES INC	2.11	0.62
ABBOTT LABORATORIES	2.31	0.56
JOHNSON & JOHNSON	2.35	0.47
BOEING CO/THE	1.09	0.46
PFIZER INC	2.02	0.43
MONDELEZ INTERNATIONAL INC-A	1.83	0.42
CHEVRON CORP	1.83	0.39

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CONSTELLATION BRANDS INC-A	1.32	0.39
HERSHEY CO/THE	1.43	0.39
PROCTER & GAMBLE CO/THE	1.98	0.33
AMERICAN TOWER CORP	0.58	0.27
INTEL CORP	2.18	0.25
FIDELITY NATIONAL INFO SERV	1.85	0.21
STRYKER CORP	0.71	0.16
ECOLAB INC	2.47	0.13
MERCK & CO. INC.	0.99	0.09
AT&T INC	2.12	0.06
VIATRIS INC	--	0.01
FIDELITY GOVT CASH RESERVES	0.36	0.01
ORGANON & CO	0.01	-0.01
GILEAD SCIENCES INC	1.20	-0.21
AFFIRM HOLDINGS INC	0.20	-0.26

*As of 7/26/2021, Alphabet Inc. Ranked 1st with an average weight of 4.58% and a contribution to return of 3.19%, Apple Inc. ranked 2nd with an average weight of 4.33% and a contribution to return of 2.72%, Microsoft Corp ranked 6th with an average weight of 3.90% and a contribution to return of 1.72%, Facebook Inc ranked 8th with average weight of 2.52% and a contribution to return of 1.47%, and Amazon.com Inc. ranked 10th with an average weight of 5.68% and a contribution to return of 1.37%.

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.