

CLIENT RELATIONSHIP SUMMARY

MARCH 28, 2023

GLOVISTA INVESTMENTS LLC

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- Certain clients may pay us a performance fee (based upon the capital appreciation in their accounts) as opposed to just a management fee. This may create an incentive for us to allocate certain limited opportunities to those clients instead of to your account.
 - Certain brokers that we use to execute trades in your account may provide research, capital introductions or other services to us that other brokers do not provide. This creates an incentive for us to use those brokers, even if the other brokers would provide better service at lower cost.
 - Conflicts may exist between our employees and your account interests. For example, employees may want to buy or sell securities in their personal accounts that are the same securities that are being purchased by us on your behalf. In those cases, there could be a conflict between the personal interests of those employees and you.