

The Counterpoint Risk & Return Optimized Model Portfolio Series is Now Available at Altruist

SAN DIEGO, CA — October 20, 2026 — Counterpoint Funds, LLC ("Counterpoint"), a quantitative artificial intelligence ("A.I.") fund and model portfolio provider, today announced that its **Counterpoint Risk & Return Optimized Model Portfolio Series** is now available on the Model Marketplace at Altruist. The models went live on September 30, 2026.

"Listing on Altruist's Model Marketplace gives advisors nationwide a straightforward way to put our quantitative process to work for their clients," said Daniel Krause, Partner and Head of Sales at Counterpoint. "Each model applies a systematic, A.I.-driven approach to equity and fixed income selection, with strategic allocations to diversifier funds intended to help manage volatility and improve long-run portfolio outcomes."

The series is built as an all-in-one portfolio solution for financial advisors. At its core is the Counterpoint Machine Learning Model, a quantitative A.I. engine trained on years of historical data to select securities and asset classes across equity, fixed income, and commodities. Drawing on a hand-selected universe of roughly 100 public funds — spanning broad equity asset classes, countries, factor mixes, and capitalizations — the models pair low-cost passive ETFs with actively managed funds, so an advisor can allocate a client's entire liquid portfolio through a single, unified approach.

Each portfolio holds a fixed 30% allocation to Counterpoint's fixed income and equity diversifier funds, which are designed to help manage risk and support portfolio performance over the long run. Historically, Counterpoint's machine learning-driven process has also helped improve security selection, particularly on the riskier equity side of a portfolio.

Notably, the machine learning model does not set the split between equity and fixed income. That weighting stays with the advisor, based on their assessment of each client's risk tolerance — preserving advisor discretion over the decision that matters most to the client relationship.

"Expanding the range of strategies available through Altruist's Model Marketplace gives advisors greater choice in how they build and manage client portfolios," said Adam Grealish, VP of Product at Altruist. "Counterpoint's models bring a systematic, quantitatively driven approach that advisors can efficiently implement through the Altruist platform."

To learn more about the Counterpoint Risk & Return Optimized Model Portfolio Series, visit cpfunds.com/model-portfolios.

About Counterpoint Funds, LLC

Counterpoint Funds is a systematic, quantitative A.I. and research driven mutual fund, ETF and model portfolio provider managing over \$3 billion in assets as of September 2026. Counterpoint is focused on offering quantitative fixed income and equity diversifier strategies designed to drive portfolio performance over the long-run. Counterpoint's mutual funds, ETFs and model portfolios employ artificial intelligence (A.I.) driven quantitative investment strategies that base asset allocation and security selection decisions on academic research, statistical analysis and machine learning. Counterpoint Funds, LLC, is located at: 12770 High Bluff Drive, Suite 380, San Diego, CA 92130. Tel: 844-273-8637

NOT FDIC INSURED - MAY LOSE VALUE - NO BANK GUARANTEE

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Important Risk Information

Important information about Counterpoint's funds is available in their prospectus, which can be obtained at counterpointfunds.com or by calling 844-273-8637. The prospectus should be read carefully before investing. Investors should carefully consider the investment objectives, risks, charges, and expenses of the funds managed by Counterpoint Funds. The Counterpoint Funds fund family is distributed by Northern Lights Distributors, LLC member FINRA/SIPC. Counterpoint Funds, LLC and LPL Financial are not affiliated with Northern Lights Distributors, LLC member [FINRA/SIPC](#).

All investments involve risk, including loss of principal. Be aware that fluctuations in the financial markets and other factors may cause declines in the value of your account. There is no guarantee that any particular asset allocation or mix of funds will meet your investment objectives or provide you with a given level of income. Prices of mid- and small-cap stocks often fluctuate more than those of large-company stocks. Investments in stocks or bonds issued by non-U.S. companies are subject to risks including country/regional risk and currency risk. These risks are especially high in emerging markets.

Counterpoint's investment process incorporates quantitative artificial intelligence models, including machine learning techniques, which are subject to risks inherent in any data-driven approach. The effectiveness of these models depends on the accuracy, quality, relevance, and interpretation of underlying data and assumptions, and there is a risk that models may produce inaccurate assessments, become less effective due to changing market conditions, or fail to perform as expected. Rapidly evolving or unforeseen market environments may reduce the predictive value of model outputs and adversely affect investment decisions and portfolio performance. To help mitigate these risks, Counterpoint maintains rigorous research, testing, monitoring, and oversight processes designed to address potential issues such as algorithmic bias, overfitting, technical errors, and systemic model limitations. Counterpoint's investment professionals supervise machine learning outputs and continuously evaluate model effectiveness, while monitoring developments in the regulatory landscape to support compliance with applicable laws, regulations, and industry best practices. However, no assurance can be given that the models or investment strategies will be successful under all market conditions.

The Counterpoint Risk & Return-Optimized Model Portfolio Series includes funds advised by Counterpoint and is subject to a conflict of interest because it receives an advisory fee for managing Counterpoint funds. This fee may affect the judgment of Counterpoint funds when constructing the model portfolio.

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