EVENTIDE

Eventide Exponential Technologies Fund

Q4 2026 Presentation

Founded: 2008

Headquarters: Boston, MA

Vision:

To serve individuals, financial advisors, and institutions by offering high performance investments that create compelling value for the global common good.

Funds:

- Eventide Gilead Fund
- Eventide Healthcare & Life Sciences Fund
- Eventide Exponential Technologies Fund
- Eventide Large Cap Focus Fund
- Eventide Balanced Fund
- Eventide Dividend Growth Fund
- Eventide Core Bond Fund
- Eventide Limited-Term Bond Fund

AUM:

$8.0B in net assets under management[1]

There is no guarantee that the Adviser will meet its objectives.

1. Data is as of September 30, 2026, exclusive of Eventide Ventures products.

Eventide Exponential Technologies Fund

Fund Objective
Seeks to provide long-term capital appreciation.

A: ETAEX | C: ETCEX | I: ETIEX | N: ETNEX

About the Fund
A concentrated mutual fund representing our thesis regarding long-term capital appreciation in the information technology, communications, internet and direct marketing retail, and healthcare technology and devices industries. (≥80%).

Benchmarks
Bloomberg US 2500 Technology Total Return Index

Morningstar Category
US Fund Technology

Total Net Assets
$98M

As of September 30, 2026. The term "exponential" means the potential for accelerated advancements in underlying technologies that can positively impact capabilities and development cycles of a company's products and services. Not every company in the Fund's portfolio will experience exponential growth, and the Fund is not expected to deliver exponential returns. These companies include smaller development-stage companies. The Bloomberg US 2500 Technology Total Return Index is a float market-cap-weighted equity benchmark derived from membership of the Bloomberg US 2500 Index. Investors cannot directly invest in an index, and unmanaged index returns do not reflect any fees, expenses, or sales charges. The volatility of an index may be materially different than that of the Fund, and investors should not expect the Fund to achieve the same results as a listed index. See the Important Information section for additional information related to benchmark sourcing. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risk, including the possible loss of principal..

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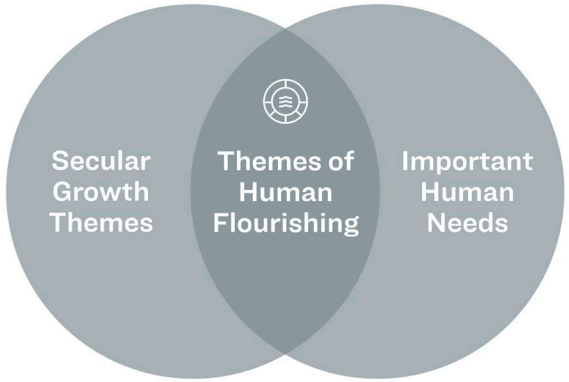
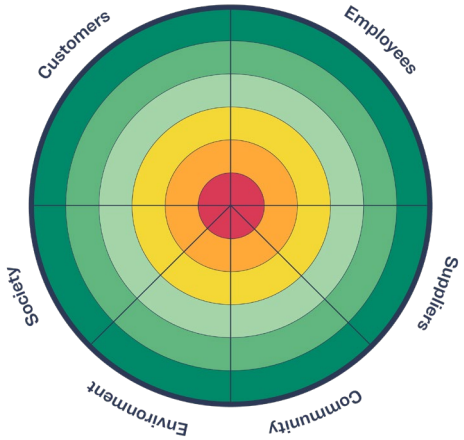
Eventide Distinctives



Themes of Human Flourishing

Seeking to invest in companies positioned to participate in long-term secular investment themes that serve important human needs.



Creating Compelling Value for Society and the Global Common Good

Focused on identifying and investing in companies capable of increasing profitability and growth by serving well the needs of customers, employees, suppliers, communities, the environment, and society.

For informational purposes only. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risks, including the possible loss of principal. We refer to long-term secular investment themes as those that tend to be persistent through market conditions.

Fund Distinctives

Focused on small and mid-sized companies

Median market capitalization of $35.6B.

Highly concentrated investment approach

Investing in 25–75 companies within select industries seeking a high active share vs benchmark and other technology mutual funds.

Compelling value for society and other stakeholders

Targeting large scale unmet technological needs to address compelling requirements in society.

Median market capitalization as of 09/30/2026. For informational purposes only. There is no guarantee that the Adviser's approach will produce the desired results. All investments involve risks, including the possible loss of principal.

Portfolio Management

Finny Kuruvilla, MD, PhD

Co-Chief Investment Officer, Senior Portfolio Manager

Finny Kuruvilla, MD, PhD, serves as Co-Chief Investment Officer and Senior Portfolio Manager for Eventide. He serves as the Lead Portfolio Manager for Eventide's Strategic Growth, Healthcare & Life Sciences, and Technology Strategies. He also is a Managing Director for Eventide Ventures, as well as a Founding Member of Eventide.

Experience and Education

- Principal role at Clarus Ventures
- Postdoctoral research: information metrics, statistics, Mahalanobis distance, pseudo-Bayesian expectation-maximization, likelihood ratio-based computation, cluster analytics on massive data sets
- MD and PhD from Harvard Medical School
- MS in Electrical Engineering and Computer Science from MIT
- BS in Chemistry from Caltech

Darric White

Portfolio Manager, Senior Research Analyst

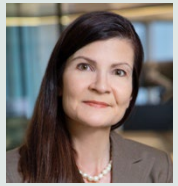
Darric White serves as Co-Portfolio Manager for Eventide's Technology Strategy and Senior Research Analyst for other Eventide strategies. He is primarily responsible for evaluating and monitoring new and existing equity investment opportunities in the portfolios, with a focus on technology research.

Experience and Education

- Senior Research Analyst at JAT Capital, primarily covering the software sector
- Analyst at Shellback Capital
- B.A. in Political Science from Middlebury College

Investment Team

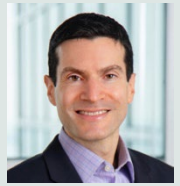
Finny Kuruvilla, MD, PhD
Co-CIO, Senior Portfolio Manager



Dolores Bamford, CFA
Co-CIO, Senior Portfolio Manager

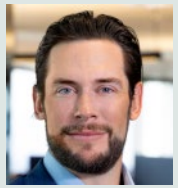
Chris Grogan, CFA
Portfolio Manager, Director of Asset Allocation Services

I-hung Shih, PhD
Portfolio Manager, Managing Director



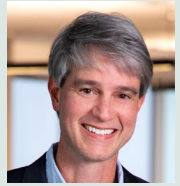
Andrew Singer, CFA
Portfolio Manager, Senior Research Analyst

Tyler Frugia
Portfolio Manager, Head of Portfolio Analytics

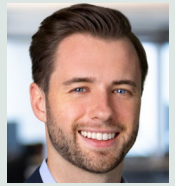


Darric White
Portfolio Manager, Senior Research Analyst

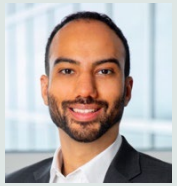
Westley Dupray, CFA
Senior Research Analyst, Partner



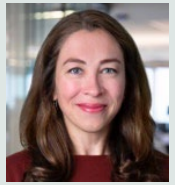
Bert Kinsey, PhD, PharmD
Research Analyst, Principal



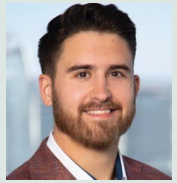
Drew Biedermann, PhD
Research Analyst, Senior Associate



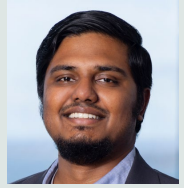
Reginald Smith
Portfolio Manager, Senior Research Analyst



Faina Rozental-Behrer
Portfolio Manager, Senior Research Analyst

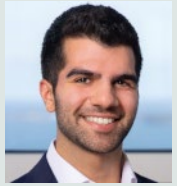


Nicholas Leibold, CFA
Senior Research Analyst



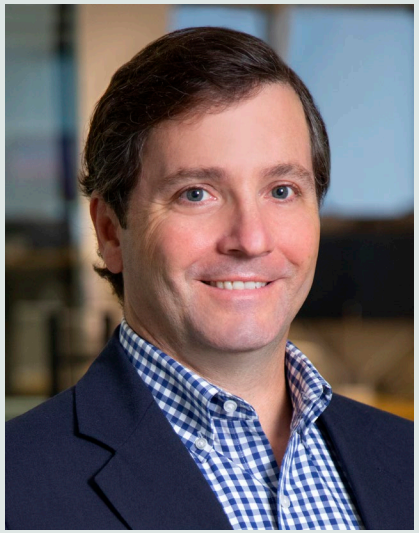
Xavier Raju
Investment Analyst, Generalist

Alexandra Cobourn
Research Analyst

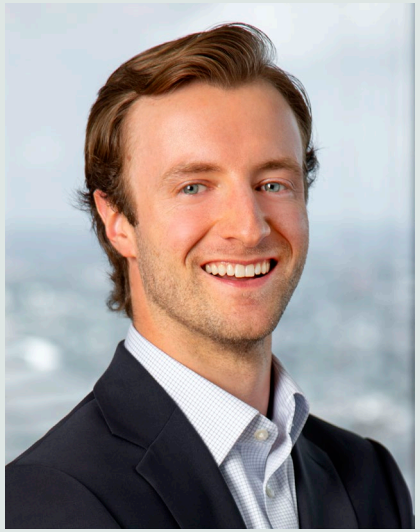


Adam Golpavar
Associate Research Analyst

Trading Team



Colin Delaney
Head of Trading, Portfolio Specialist



Conor Kelly
Trader

Business 360® Research Team

Tyler Frugia
Portfolio Manager, Head of Portfolio Analytics

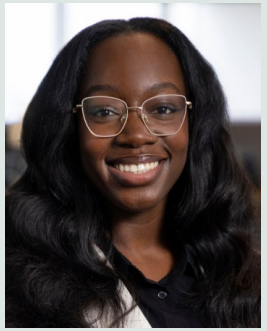
Brock Treworgy, CAMS, CFE
Senior Business 360 Research Manager

Abel Ballew

Senior Business 360 Analyst, Team Lead

Jaime Joshua

Senior Business 360 Research Analyst, Stewardship Lead



Maame Adwoa Ofori-Kwafo

Business 360 Research Analyst

Investment Philosophy

We believe **high-quality companies** that excel at **creating value for others** and **trade at a discount to intrinsic value** offer superior long-term risk-adjusted returns.

The Adviser's judgment about the quality and intrinsic value of companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive gains, or avoid losses.

Investment Process

IDEA GENERATION

Understand the big picture of fundamentals within the sectors and industries. Identify the most attractive investment themes and companies best positioned for participation.

FINANCIAL ANALYSIS

Look for companies with current financial strength and long-term potential of profitability.

QUALITATIVE ANALYSIS

Look for "high quality" companies through assessment of competitive advantages, management teams, and value creation.

VALUATION ANALYSIS

Measure intrinsic value. Identify companies with the most attractive upside potential and highest long-term probability of gain vs. loss.

RISK MANAGEMENT

Construct portfolio with goals of high internal diversification and low market correlation.

MACRO POSITIONING

Adjust portfolio risk exposure by rebalancing position sizes.

EVENTIDE EXPONENTIAL TECHNOLOGIES FUND

Continue to monitor investment case. Adjust estimates, price targets, conclusions, and position sizes, to reflect changes in the fundamentals.

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Idea Generation

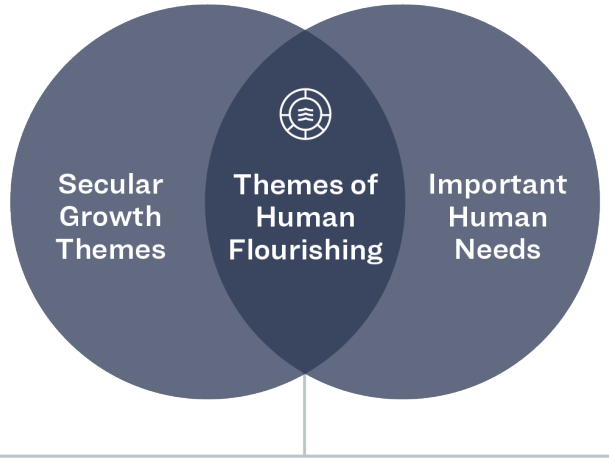
Start with themes, then identify companies we believe are best positioned for participation

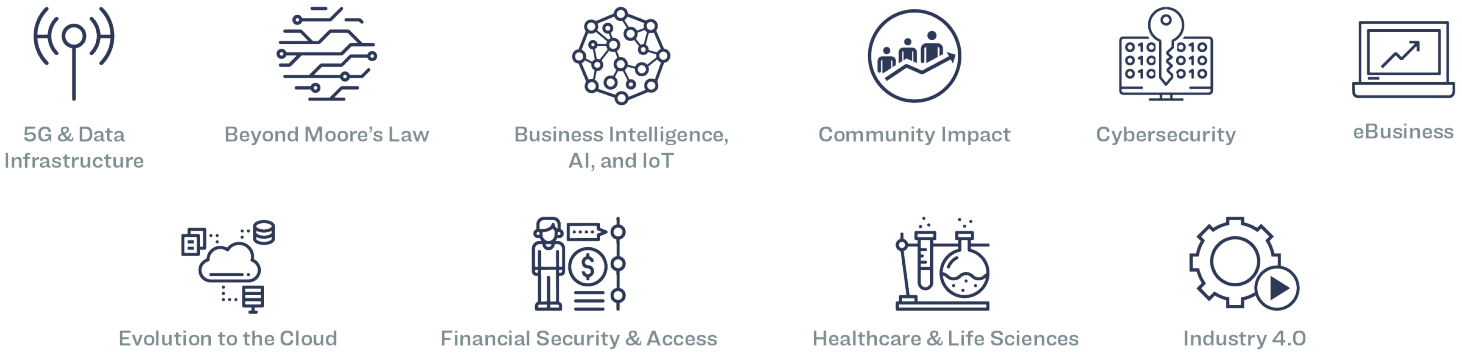
- Understand the big picture of industries.
- Discern attractive long-term secular investment themes.
- Leverage consultants, industry experts, Key Opinion Leaders.
- Review industry specific reports, trends, and third-party research.
- Study competitors, suppliers, and customers of existing holdings.
- Identify companies we believe are best positioned for participation.

The Adviser's judgment about industries, secular themes, and particular companies may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses. We refer to long-term secular investment themes as those that tend to be persistent through market conditions.

Investment Themes

Seeking to invest in companies positioned at the nexus of long-term secular growth themes and important human needs.



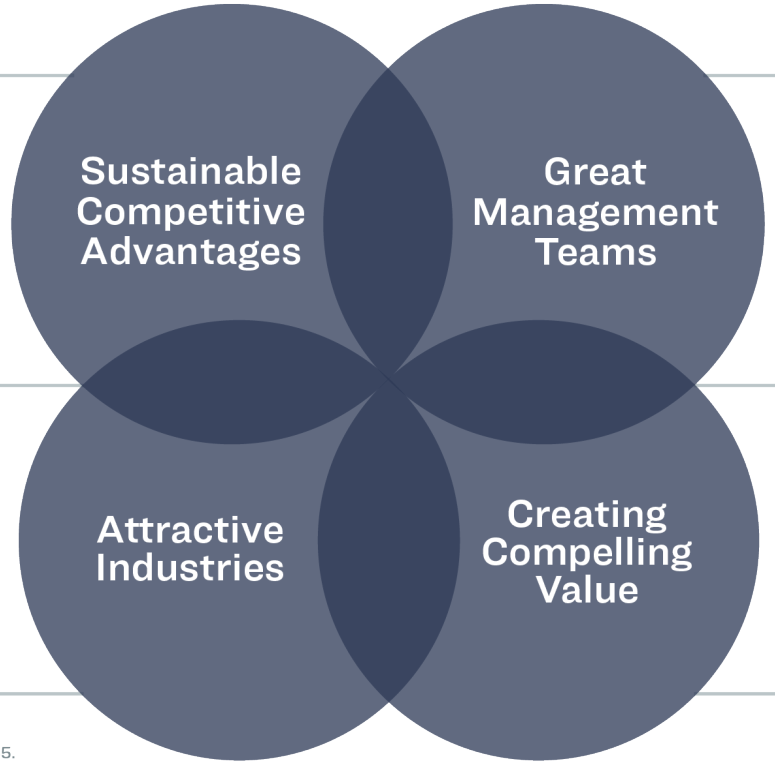


These are representative examples of themes in the Eventide Funds. The Adviser's judgment about secular themes may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

Qualitative Analysis

Look for "high-quality" companies, which we believe to have:

- Proprietary assets
- Innovation/new product development
- Culture/business model
- Customer relationships
- Economies of scale



- Are focused on long-term value creation by pursuing the right strategies and capital allocation
- Clearly communicate and motivate employees to implement strategy
- Are properly incentivized
- Have a high degree of integrity, candor, and transparency

1: Competitors are disciplined/rational*
2: High barriers to entry
3: Bargaining power with suppliers
4: Bargaining power with customers
5: Low threat of substitutes or from disruptive innovation

- Products/services serve society and authentic human flourishing
- Focused on stakeholder value creation
- Human-centered operations strategies
- Rich organizational culture

* Michael E. Porter, "How Competitive Forces Shape Strategy", Harvard Business Review, May 1979 (Vol. 57, No. 2), pp. 137-145.

The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

Our Research Framework: Business 360®

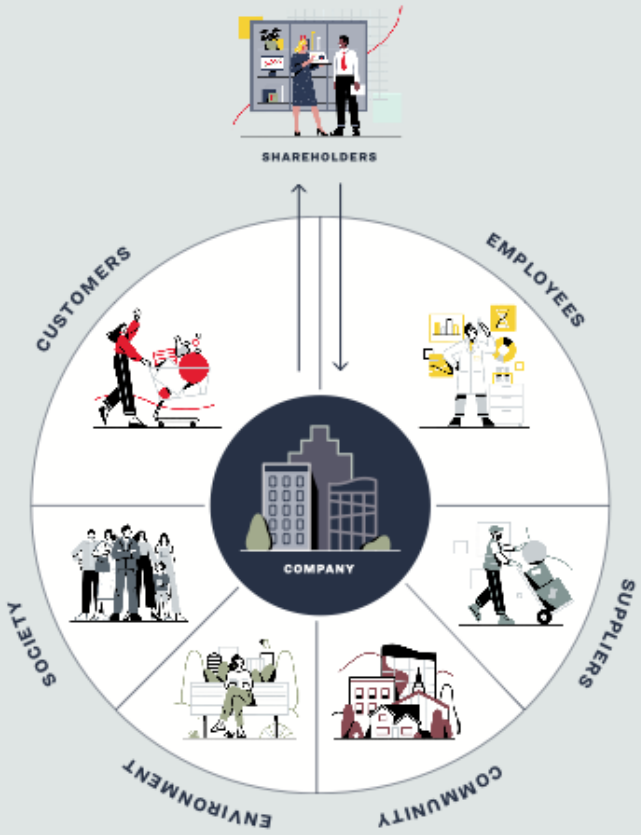
Our **proprietary framework** for evaluating both a company's **long-term competitive advantage** and its **impact on human flourishing** by analyzing its **operations and strategy** through the lens of **key stakeholders.**

Reference to Eventide's Business 360® approach is provided for illustrative purposes only and indicates a general framework of guiding principles that inform Eventide's overall research process.
The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

We believe what's right...

Companies that place a premium on:

- Customer satisfaction
- Employee morale
- Supplier partnership
- Societal impact
- Environmental stewardship



...is also smart.

Tend to have:

- Higher customer loyalty
- Higher productivity
- Resilient supply chains
- Stronger brands
- Sustainable productive yield

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Financial Analysis

Look for companies with long-term financial strength

QUALITIES:

- ✔ Existing successful business model that is already profitable or has the potential to be profitable in the next years (demonstrating operating leverage)
- ✔ Clean capital structure (no heavy debt burden)
- ✔ No known history of ill-conceived and/or poorly executed capital allocation decisions (extremely dilutive, poor M&A)
- ✔ Strong operational execution (walking the talk)

- Analyze historical financial performance.

- Model future financial performance:

3-YEAR FORECAST:

- Income Statement
- Balance Sheet
- Cash Flow Statement

5-TO 10-YEAR FORECAST:

- Earnings Power
- Free Cash Flow

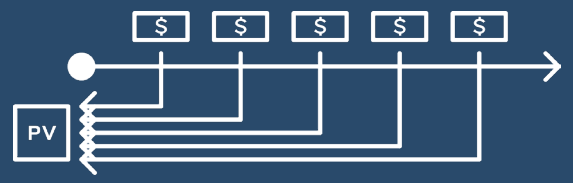
- Compare our estimates with market consensus to assess opportunity.

The Adviser's analysis may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

Valuation Analysis

Look for companies with attractive value and potential

- Measure intrinsic value through Discounted Cash Flow (DCF) analysis.
- Build DCF model using forecast assumptions and then probability-adjust the calculated net present value based on our qualitative assessment of the company.
- Conduct comparable company valuation analysis
- Triangulate valuation between the DCF (primary method) and comparable company valuation analysis (secondary method) to better evaluate the opportunity.
- Compare our estimates to market consensus to assess opportunity.
- Seek to identify companies with the most attractive upside potential and highest long-term probability of gain vs. loss.



We believe the best way to measure the intrinsic value of a company is with **Discounted Cash Flow** valuation analysis.

This takes into account the magnitude, timing, and risk of future free cash flows, discounted to today based on the company's cost of capital. It also takes into account the sustainability of its potential competitive advantages (reflected in the fade rate).

The Adviser's analysis may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

Macro Positioning

Position portfolio according to our macro views

- Establish macro views by synthesizing three key data streams:
  - Leading economic indicators
  - Valuation
  - Sentiment
- Position portfolio using cash and other tools to allow stock selection on fundamental grounds to mesh with our macro views at the portfolio level.

There is no guarantee that the Adviser's views will be accurate or come to pass. All investments involve risk, including the possible loss of principal.

Portfolio Construction

Risk management and ongoing evaluation

- Concentrated portfolio of approximately 25-75 companies (based on conviction level and asymmetry of gain vs. loss).
- Manage for risk through high internal diversification and pursuit of consummate knowledge of holdings.
- Devote 50% of investment team time to actively monitoring portfolio holdings, scrutinizing investment case, and building conviction through circling diligence.[1]
- Adjust positioning for company-specific binary events.
- Adjust estimates, price targets, conclusions, and position sizes to reflect changes in fundamentals.

1. Circling diligence refers to the process of continuously returning to and performing investment research and diligence on portfolio holdings. There is no guarantee that the Adviser will meet its objectives. All investments involve risk, including the possible loss of principal.

Sell Discipline

Continuously scrutinize investment case

- Investment thesis failure.
- No longer meets Eventide's Business 360® criteria.
- Price target achieved.
- Management transition or other concerns.
- More attractive use of capital elsewhere.

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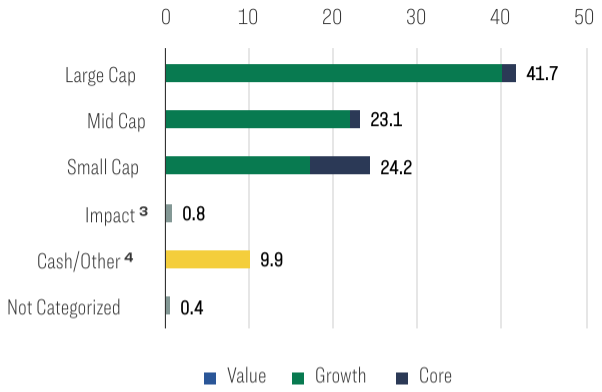
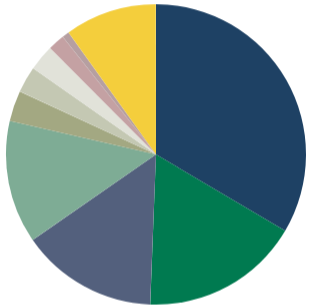
Composition

A: ETAEX | C: ETCEX | I: ETIEX | N: ETNEX

Portfolio Composition[1 2] (%) 09/30/2026



Industry Group Allocation[2 5] (%) 09/30/2026



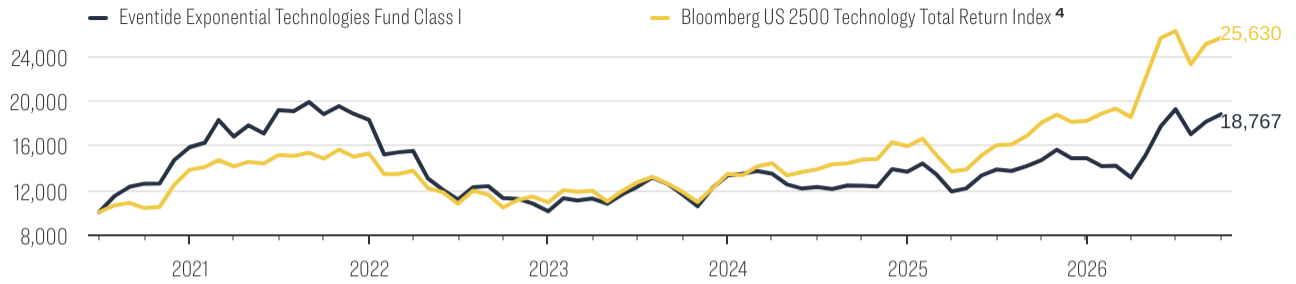
Semiconductors & Semi. Equipment	33.5
Health Care Equip. & Svcs.	17.1
Software & Services	14.7
Technology Hardware & Equipment	13.2
Financial Services	3.3
Energy	2.8
Capital Goods	2.8
Pharmaceuticals, Biotechnology & Life Sciences	1.8
Impact Initiative	0.8
Cash/Other [4]	9.9

1. Source: © Morningstar, Inc. (2026). All rights reserved. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information.
2. Allocation percentages are subject to change at any time, and should not be considered investment advice. Due to rounding, numbers may not add up to 100.
3. Impact bonds fund business models that strive to have significant social or environmental effects.
4. Includes cash, cash equivalents, money market funds and options.
5. Source: Bloomberg Finance L.P.

Growth of 10k

A: ETAEX | C: ETCEX | I: ETIEX | N: ETNEX

Growth of $10,000[1 2 3] 06/30/2020-09/30/2026



Eventide Exponential Technologies Fund expenses: Class I, Gross Expenses 1.54%, Net Expenses 1.35%; Class A, Gross Expenses 1.79%, Net Expenses 1.60%; Class C, Gross Expenses 2.54%, Net Expenses 2.35%; Class N, Gross Expenses 1.74%, Net Expenses 1.55%.Effective September 1, 2025, the expenses were reduced, as described in the Statement of Additional Information Supplement dated August 29, 2025.The adviser has contractually agreed to waive fees and/or reimburse expenses of the Fund through 10/31/2026. The agreement may be terminated by the Fund's Board of Trustees on 60 days' written notice.

This is a hypothetical illustration and is not intended to reflect the actual performance of any particular account. Future performance cannot be guaranteed and investment returns will fluctuate with market conditions.

Performance is historical and does not guarantee future results. Investment return and principal value will fluctuate with changing market conditions so that when redeemed, shares may be worth more or less than their original cost. Current performance may be lower or higher than the data quoted. Investors cannot directly invest in an index, and unmanaged index returns do not reflect any fees, expenses, or sales charges. The volatility of an index may be materially different than that of the Fund, and investors should not expect the Fund to achieve the same results as a listed index. This material must be read along with the Fund's prospectus, which may be obtained at eventidefunds.com/prospectus. Performance data current to the most recent month-end may be obtained by calling 1-877-771-EVEN (3836).

1. This chart is for illustrative purposes and assumes that a $10,000 investment was made on the Fund's inception date of 06/30/2020 and that all dividends and capital gains were reinvested. Hypothetical performance often shows markedly better results than actual management and should not be the basis for an investment decision. A variety of factors could impact investment decision making or otherwise cause differences between the hypothetical performance and actual investor returns.
2. Compares the Eventide Exponential Technologies Fund Class I's performance to index performance over the periods shown. Performance will differ for other fund classes, based upon fees and commissions.
3. The returns shown do not reflect the deduction of taxes that a shareholder would pay on fund distributions or on the redemption of fund shares. Because of ongoing market volatility, fund performance may be subject to substantial short-term changes.
4. The Bloomberg US 2500 Technology Total Return Index is a float market-cap-weighted equity benchmark derived from membership of the Bloomberg US 2500 Index.

Trailing Returns

A: ETAEX | C: ETCEX | I: ETIEX | N: ETNEX

Trailing Returns[1] (%) 09/30/2026

Eventide Exponential Technologies Fund	YTD	3-mos	1-year	3-year[2]	5-year[2]	10-year[2]	Since Inception[2]	Inception Date
Class I	26.54	-2.37	28.03	17.48	-0.02	-	10.59	06/30/2020
Class A without load	26.40	-2.41	27.73	17.20	-0.25	-	10.34	06/30/2020
Class A with 5.75% load	19.14	-8.02	20.40	14.91	-1.42	-	9.30	06/30/2020
Class C	25.63	-2.58	26.82	16.30	-1.02	-	9.52	06/30/2020
Class N	26.37	-2.41	27.78	17.24	-0.23	-	10.36	06/30/2020
Benchmark								
Bloomberg US 2500 Technology Total Return Index[3]	40.93	-2.33	42.15	29.44	11.62	-	16.25	06/30/2020

Eventide Exponential Technologies Fund expenses: Class I, Gross Expenses 1.54%, Net Expenses 1.35%; Class A, Gross Expenses 1.79%, Net Expenses 1.60%; Class C, Gross Expenses 2.54%, Net Expenses 2.35%; Class N, Gross Expenses 1.74%, Net Expenses 1.55%.Effective September 1, 2025, the expenses were reduced, as described in the Statement of Additional Information Supplement dated August 29, 2025.The adviser has contractually agreed to waive fees and/or reimburse expenses of the Fund through 10/31/2026. The agreement may be terminated by the Fund's Board of Trustees on 60 days' written notice.

Performance is historical and does not guarantee future results. Investment return and principal value will fluctuate with changing market conditions so that when redeemed, shares may be worth more or less than their original cost. Current performance may be lower or higher than the data quoted. Investors cannot directly invest in an index, and unmanaged index returns do not reflect any fees, expenses, or sales charges. The volatility of an index may be materially different than that of the Fund, and investors should not expect the Fund to achieve the same results as a listed index. This material must be read along with the Fund's prospectus, which may be obtained at eventidefunds.com/prospectus. Performance data current to the most recent month-end may be obtained by calling 1-877-771-EVEN (3836).

1. The returns shown do not reflect the deduction of taxes that a shareholder would pay on fund distributions or on the redemption of fund shares. Because of ongoing market volatility, fund performance may be subject to substantial short-term changes.
2. Performance figures for periods greater than 1 year are annualized. Annualized since inception figures use an inception date of 06/30/2020.
3. The Bloomberg US 2500 Technology Total Return Index is a float market-cap-weighted equity benchmark derived from membership of the Bloomberg US 2500 Index.

Calendar Year Returns

A: ETAEX | C: ETCEX | I: ETIEX | N: ETNEX

Calendar Year Returns[1] [2] (%)				2021-2025	
	2021	2022	2023	2024	2025
Eventide Exponential Technologies Fund I	15.64	-44.98	31.96	2.52	8.94
Bloomberg US 2500 Technology Total Return Index [3]	10.66	-28.77	23.56	18.48	14.32

Eventide Exponential Technologies Fund expenses: Class I, Gross Expenses 1.54%, Net Expenses 1.35%; Class A, Gross Expenses 1.79%, Net Expenses 1.60%; Class C, Gross Expenses 2.54%, Net Expenses 2.35%; Class N, Gross Expenses 1.74%, Net Expenses 1.55%.Effective September 1, 2025, the expenses were reduced, as described in the Statement of Additional Information Supplement dated August 29, 2025.The adviser has contractually agreed to waive fees and/or reimburse expenses of the Fund through 10/31/2026. The agreement may be terminated by the Fund's Board of Trustees on 60 days' written notice.

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1. Compares the Eventide Exponential Technologies Fund Class I's performance to index performance over the periods shown. Performance will differ for other fund classes, based upon fees and commissions.
2. The returns shown do not reflect the deduction of taxes that a shareholder would pay on fund distributions or on the redemption of fund shares. Because of ongoing market volatility, fund performance may be subject to substantial short-term changes.
3. The Bloomberg US 2500 Technology Total Return Index is a float market-cap-weighted equity benchmark derived from membership of the Bloomberg US 2500 Index.

Market Risk

A: ETAEX | C: ETCEX | I: ETIEX | N: ETNEX

Market Risk[1 2 3] 09/30/2026

	Standard Deviation		Beta		Alpha(%)		R-Squared(%)	
	3-yr	Inception	3-yr	Inception	3-yr	Inception	3-yr	Inception
Eventide Exponential Technologies I	25.11	26.18	0.98	1.01	-9.09	-4.40	84.41	79.80
Bloomberg US 2500 Technology Total Return Index[4]	23.46	23.28	1.00	1.00	-	-	100.00	100.00

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2. The performance and risk factor comparisons are against the Bloomberg US 2500 Technology Total Return Index. Alpha is a measure of performance on a risk-adjusted basis. It takes the volatility (price risk) of a fund and compares its risk-adjusted performance to the Index. Any excess return of a fund relative to the return of the Index is a fund's alpha. Beta is a measure of the volatility of a fund relative to the Index. A beta greater than 1 is more volatile than the Index. R-Squared is a measure of how a fund's performance correlates with the Index's performance and it can help assess how likely it is that beta is statistically significant. Standard Deviation of return measures the amount of variation in historical performance from period to period.
3. Annualized since inception figures use an inception date of 07/01/2020 and not the actual inception date of 06/30/2020 as only full month data is used in Market Risk calculations.
4. The Bloomberg US 2500 Technology Total Return Index is a float market-cap-weighted equity benchmark derived from membership of the Bloomberg US 2500 Index.

Important Information

Mutual Funds involve risk including the possible loss of principal. Past performance does not guarantee future results.

The Fund typically invests at least 80% of its net assets in companies that the Adviser believes are participating in and benefiting from technologies, innovations, technology themes, or technology trends which can include information technology, e-commerce discretionary, internet media and services, healthcare technology, healthcare devices, or transaction & payment processing services industries. The term "exponential" means the potential for accelerated advancements in underlying technologies that can positively impact capabilities and development cycles of a company's products and services. Not every company in the Fund's portfolio will experience exponential growth, and the Fund is not expected to deliver exponential returns. The Fund's ethical values screening criteria could cause it to under-perform similar funds that do not have such screening criteria. The Fund can invest in smaller-sized companies which may experience higher failure rates than larger companies and normally have a lower trading volume than larger companies. The Fund may experience higher volatility than the general market due to being concentrated in the technology industries. Companies in the technology industries have different risks including but not limited to products becoming obsolete, and entrance of competing products. Communications companies may underperform due to legislative or increased competition. Internet and Direct Marketing Retail companies may underperform due to legislative or increased government supervision. Healthcare Technology and Devices Companies may be heavily dependent on clinical trials with uncertain outcomes and decisions made by the governments and regulatory authorities. Further, these companies are dependent on patent protection. The Fund has non-diversification risk as a high percentage of Fund assets may be invested in a limited number of companies. The Fund can have risk related to option investing. There are special risks associated with investments in foreign companies including exposure to currency fluctuations, less efficient trading markets, political instability and differing auditing and legal standards. The Fund can invest in private companies. Private investments include various risks including but not limited to lack of liquidity, capital commitment risk, and valuation risk. Private companies may not be financially profitable and have uncertain futures, subjecting them to additional risks. The Fund has no history of operations prior to its inception date.

Investors should consider a fund's investment objectives, risks, charges and expenses carefully before investing or sending money. This and other important information can be found in the prospectus, which can be obtained at www.eventidefunds.com/prospectus or by calling 1-877-771-EVEN (3836). Please read the prospectus carefully before investing. Eventide Mutual Funds are distributed by Northern Lights Distributors, LLC, Member FINRA/SIPC, which is not affiliated with Eventide Asset Management, LLC.

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Investment Ideals

We seek investment opportunities that reflect these ideals:

- **We believe in respecting the life and dignity of all people.** This means we invest in areas that honor life, like treatments seeking to address challenging diseases. This also means we seek to avoid profiting from anything designed to harm or exploit a life including abortion services, weaponry, and tobacco.
- **We believe in preserving justice and peace.** This means we look to invest in companies that are governed by strong ethics and take extra precautions when considering companies with ties to countries where we have concerns about human rights abuses.
- **We believe in the importance of family and community.** This means we look to serve marginalized communities and people. This also means we don't invest in harmful or addictive products or services such as violent entertainment or pornography.
- **We believe in responsible management practices.** This means we look to invest in companies with leadership teams that treat their employees, customers, and other stakeholders fairly. This also means we don't invest in companies with a concerning record of mistreatment, litigation, or regulatory actions.
- **We believe in environmental stewardship.** This means we look to invest in companies supporting the expansion to cleaner, more efficient sources of energy and companies leading in their industries toward better stewardship practices. This also means we don't invest in companies with a concerning record of environmental fines or abuse.

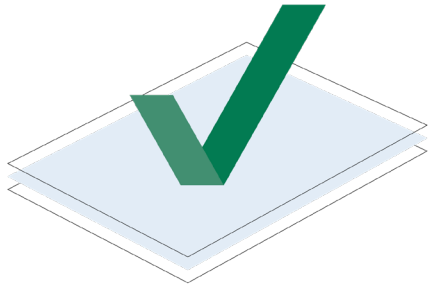
The Fund's ethical values screening criteria could cause it to underperform similar funds that do not have such screening criteria. This could be due to ethically acceptable companies falling out of favor with investors or failing to perform as well as companies that do not meet the Fund's ethical screening guidelines. The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

Values-Based Analysis

There are three dimensions to our approach to values-based investing:

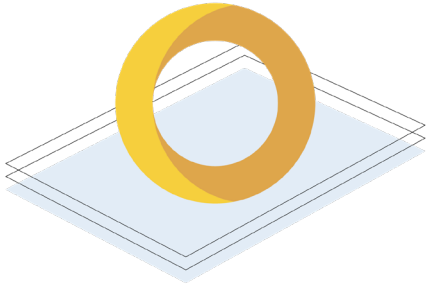
AVOID

Create an investable universe of securities that pass our screens, grounded in our values.



EMBRACE

Conduct original Business 360® research to find the highest quality opportunities that contribute to human flourishing through value creation for society and other key stakeholders.

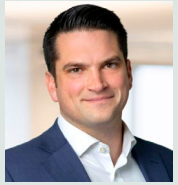


ENGAGE

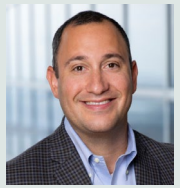
Engage portfolio companies and security issuers on Business 360® issues to advocate for positive change.

The Strategy's ethical values screening criteria could cause it to underperform similar strategies that do not have such screening criteria. This could be due to ethically acceptable companies falling out of favor with investors or failing to perform as well as companies that do not meet the Strategy's ethical screening guidelines. Reference to Eventide's Business 360 approach is provided for illustrative purposes only and indicates a general framework of guiding principles that inform Eventide's overall research process. The Adviser's judgment about the quality of a particular company may prove to be incorrect. There is no guarantee that any investment will achieve its objectives, generate positive returns, or avoid losses.

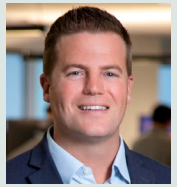
Sales Team



Michael Schnackenberg
Head of Distribution



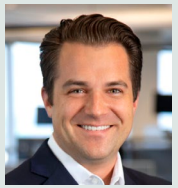
Jacob Seif, CIMA®, CFP®
Director of Advisor Sales



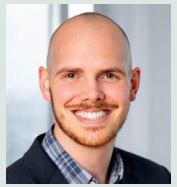
Mark Wambolt
Head of Strategic Partnerships

Greg Gunter
Senior Regional Director, **Southeast Region**

Lans Slack
Senior Regional Director, **Mid-Atlantic Region**



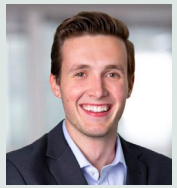
Colby Smidt
Regional Director, **New England Region**



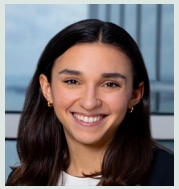
Spencer Martin
Regional Director, **Midwest Region**

Nathan Parrott
Regional Director, **Pacific Northwest Region**

Clay Henderson
Regional Director, **West Coast Region**



Matt McEathron
Manager of Investor Relations



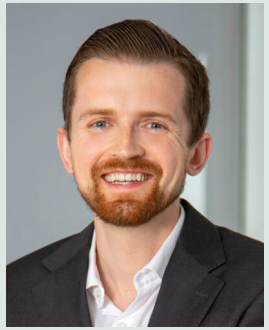
Shelby Keim
Key Accounts Senior Associate

Rob Carney
Senior Manager, Institutional Services

Investment Consulting Group

Chris Grogan, CFA
Portfolio Manager, Director of Asset Allocation Services

Fred Ge, CFA
Senior Portfolio Consultant



Robert Carney
Senior Manager, Institutional Services

INVESTING THAT MAKES THE WORLD REJOICE®

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