

Investing with Heart: The Healthcare Stock Fund with an Ulterior Motive

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INTRODUCTION

In the world of investing, the main goal is financial growth. But what if you could align your investment goals with causes you deeply care about? [The Simplify Health Care ETF \(PINK\)](#) offers a compelling answer by allowing investors to potentially grow their portfolios while also contributing to the fight against breast cancer.

BEYOND RETURNS: A MISSION-DRIVEN INVESTMENT

PINK isn't just another healthcare fund; it's a unique example of impact investing taken a step further. It is designed to be a best-in-class, active strategy within the healthcare sector, while simultaneously championing breast cancer awareness and research. As noted in this [Forbes article](#), the fund has an "Ulterior Motive", the profound mission of maximizing its charitable contribution. To this end, Simplify donates all net profits from the ETF management fees to the [Susan G. Komen organization](#).

THE POWER OF PARTNERSHIP: SIMPLIFY AND SUSAN G. KOMEN

Susan G. Komen is a global leader in the fight against breast cancer, dedicated to saving lives by meeting the most critical needs in our communities and investing in breakthrough research to prevent and cure breast cancer. Their work spans:

Research

Funding innovative research to better understand, treat, and ultimately cure breast cancer.

Community Health

Providing support, education, and access to care for those affected by breast cancer.

Advocacy

Working to influence public policy and ensure that breast cancer remains a priority.

By investing in PINK, you become part of this vital mission. Simplify's commitment to donating a portion of its management fees directly supports Komen's ongoing efforts. This means that as you invest in the healthcare sector, a portion of your investment helps fund life-saving research, provides critical patient support, and advocates for better breast cancer care.



Total donations since inception

♥ \$450,000

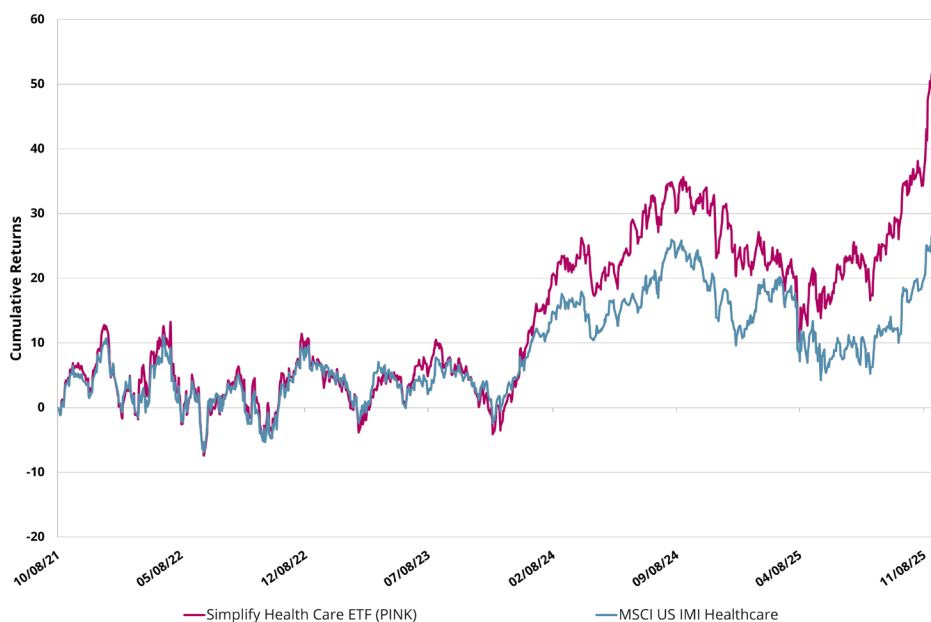
as of 06/30/26

ACTIVE MANAGEMENT AND MICHAEL TAYLOR

PINK is actively managed by Michael Taylor, a seasoned portfolio manager who brings over two decades of experience in the healthcare and biotech sectors from top firms like Citadel and Millennium. His active approach seeks to identify high-growth companies that are leading innovation within the healthcare space, providing investors with a potential edge while remaining dedicated to the charitable cause.

Beyond its philanthropic mission, the fund has demonstrated strong performance: since inception (10/8/2021) through 11/28/25, PINK has provided investors with annualized excess returns exceeding 5.7% relative to its benchmark, the MSCI US IMI Healthcare Index (NAV). The stellar performance highlights the fund's dual commitment to both impactful charitable giving and competitive healthcare sector returns.

Figure 1: PINK vs. MSCI US IMI Healthcare Total Return
10/07/21 to 11/30/25



Source: Bloomberg. 10/08/21 to 11/28/25. Data as of 12/05/2025. The performance data quoted represents past performance and is no guarantee of future results. Current performance may be lower or higher than the performance data quoted. Investment returns and the principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. For performance data current to the most recent month-end, please call (855) 772-8488 or go to simplify.us/etfs. For PINK standardized performance, [click here](#).

CONCLUSION: A SYMBOL OF HOPE AND PROGRESS

The color pink has become an internationally recognized symbol of breast cancer awareness. PINK embodies this symbol, offering investors a way to stand with those affected by breast cancer and contribute to a future where breast cancer is no longer a threat.

Imagine a future where a cure for breast cancer is found, where early detection is universal, and where every patient receives the care they need. Organizations like Susan G. Komen are working tirelessly to make this a reality, and with investments like the Simplify Health Care ETF (PINK), you can be a part of that journey.

GLOSSARY

MSCI US IMI Healthcare Index: A measure of the sensitivity of the price of a bond or other debt instrument to a change in interest rates.

NAV: The dollar value of a single share, based on the value of the underlying assets of the fund minus its liabilities, divided by the number of shares outstanding. Calculated at the end of each business day.

Important Information

Investors should carefully consider the investment objectives, risks, charges, and expenses of Exchange Traded Funds (ETFs) before investing. To obtain an ETF's prospectus or Summary prospectus containing this and other important information, please call (855) 772-8488, or visit SimplifyETFs.com. Please read the prospectus carefully before you invest.

An investment in the fund involves risk, including possible loss of principal.

The fund is actively-managed and is subject to the risk that the strategy may not produce the intended results.

The Fund focuses its investments in securities of biotechnology and the healthcare industry. Economic, legislative or regulatory developments may occur that significantly affect these industries and cause the Fund's net asset value to fluctuate due to this concentration.

The biotechnology industry can be significantly affected by patent considerations, including the termination of patent protections for products, intense competition both domestically and internationally, rapid technological change and obsolescence, government regulation and expensive insurance costs due to the risk of product liability lawsuits.

In addition, the biotechnology industry is an emerging growth industry, and therefore biotechnology companies may be thinly capitalized have limited product lines, distribution channels, resources and more volatile than companies with greater capitalizations. Biotechnology companies must contend with high development costs, which may be exacerbated by the inability to raise prices to cover costs because of managed care pressure, government regulation or price controls. Companies in the pharmaceutical industry are heavily dependent on patent protection. The expiration of patents may adversely affect the profitability of the companies. Pharmaceutical companies are also subject to extensive litigation based liability and approval of the Food and Drug Administration, a process that can be long and costly. Expanding international operations may lead to risks resulting from differences between U.S. and foreign legal, political and economic systems, regulatory regimes and market practices.

The Fund's focus on the healthcare sector may cause its value to fluctuate and be more susceptible to particular risks of the sector such as extensive government regulations, restrictions on government reimbursement for medical expenses, rising costs of medical products and services, pricing pressure, an increased emphasis on outpatient services, changes in the demand for medical products and services, a limited number of products, industry innovation, changes in technologies and other market developments.

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