

# Berkshire Hathaway (BRK) Yield Shares Purpose ETF

Earn monthly yield while investing  
in Berkshire Hathaway shares

TICKER: **BRKY**



**YIELD  
SHARES**  
by Purpose

# Earn enhanced yield while investing in Berkshire Hathaway shares

**Earn** monthly yield by investing in Berkshire Hathaway with an active covered call strategy; and

**Benefit** from the long-term growth opportunity of Berkshire Hathaway's shares.

<b>ETF TICKER</b>	<b>BRKY</b>
<b>MGMT FEES</b>	0.40%
<b>FX HEDGED</b>	

 <p><b>MONTHLY YIELD</b></p>	 <p><b>COVERED CALL STRATEGY (~50%)</b></p>	 <p><b>MODERATE LEVERAGE (~25%)</b></p>	 <p><b>TAX EFFICIENT</b></p>	 <p><b>CURRENCY HEDGING</b></p>	 <p><b>MEDIUM TO HIGH RISK</b></p>
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## How it works

### INVESTING IN BERKSHIRE HATHAWAY SHARES

-  Purchase Berkshire Hathaway common shares
- ↓
-  Use moderate leverage of ~25% to purchase additional Berkshire Hathaway shares
- ↓
-  Overlay a covered call strategy on up to 50% of the portfolio
- ↓
-  Stay invested in Berkshire Hathaway while earning an attractive, tax-efficient monthly yield

### PORTFOLIO BREAKDOWN

AS AT FEB 27, 2026

Equities Underlying Put Options	0
Call Options Written	21
Underlying Equities	1

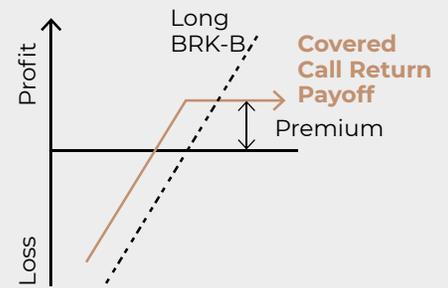
<b>Short Calls Expiring</b>	<1 mo	100.00%
	>0%	52.25%
	≤0%	47.75%
<b>Moneyness</b>	≤-4%	0.00%
	≤-8%	0.00%
	≤-12%	0.00%

## The Berkshire Hathaway (BRK) Yield Shares advantage

- Earn an attractive yield while staying invested in Berkshire Hathaway
- Participate in the long-term growth opportunity of Berkshire Hathaway
- Benefit from tax-efficient yield
- Stay protected from currency risk

## Earn yield while staying invested in Berkshire Hathaway

### COVERED CALL PAYOFF



## Berkshire Hathaway shares' historical price

AS AT FEB 27, 2026

— BRK-B COMMON SHARES



Source: Yahoo Finance  
Note: Figures are in USD

## Managed By



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Portfolio Manager  
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Head of Capital Markets &  
Portfolio Manager  
Purpose Investments

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