# 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.

| | |
|---|---|
| **ETF TICKER** | **BRKY** |
| MGMT FEES | 0.40% |
| FX HEDGED | |

**MONTHLY YIELD** | **COVERED CALL STRATEGY (~50%)** | **MODERATE LEVERAGE (UP TO 25%)** | **TAX EFFICIENT** | **CURRENCY HEDGING** | **MEDIUM TO HIGH RISK**

## 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

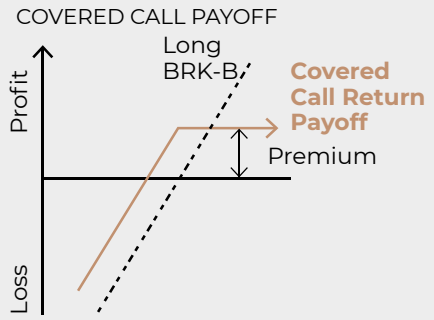
AS AT OCT 30, 2026

| | | |
|---|---|---|
| Equities Underlying Put Options | | 0 |
| Call Options Written | | 17 |
| Underlying Equities | | 1 |
| **Short Calls Expiring** | <1 mo | 100.00% |
| **Moneyness** | >0% | 16.53% |
| | ≤0% | 83.47% |
| | ≤-4% | 0.00% |
| | ≤-8% | 0.00% |
| | ≤-12% | 0.00% |

## The Berkshire Hathaway (BRK) Yield Shares advantage

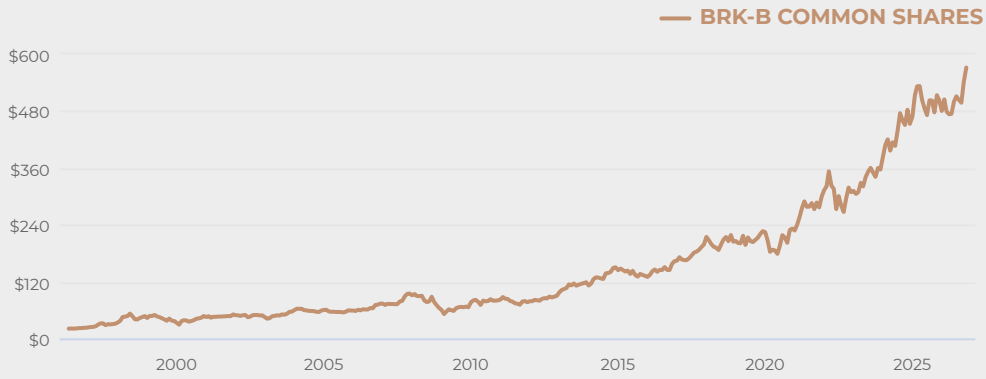
- Earn an attractive yield while staying invested in Berkshire Hathaway
- Participate in the long-term growth opportunity of Berkshire Hathaway
- Benefit from tax-efficient yield
- Stay protected from currency risk

## Earn yield while staying invested in Berkshire Hathaway




## Berkshire Hathaway shares' historical price

AS AT OCT 30, 2026




Source: Yahoo Finance
Note: Figures are in USD

## Managed By



**Nawan Butt, CFA**
Head of Capital Markets & Portfolio Manager
Purpose Investments

Commissions, trailing commissions, management fees and expenses all may be associated with investment funds. Please read the prospectus before investing. Copies of the prospectus may be obtained from purposeinvest.com. If the securities are purchased or sold on a stock exchange, you may pay more or receive less than the current net asset value. The indicated rates of return are the historical annual compounded total returns including changes in share/unit value and reinvestment of all distributions and do not take into account sales, redemption, distribution or optional charges or income taxes payable by any security holder that would have reduced returns. Investment funds are not guaranteed, their values change frequently and past performance may not be repeated. Fund distribution levels and frequencies are not guaranteed and may vary at the sole discretion of Purpose Investments.