ANCHOR
Investment Management, LLC

COMMENTARY

QUARTER 2 – 2026

PROUDLY CELEBRATING 25 YEARS
EST. 00

IN THIS ISSUE

Market/Index	2023 Close	2024 Close	2025 Close	2025 Change	As of X/X/26	2026 Change
DJIA	37,689.54	42,544.22	48,063.29	12.97%	###	###
NASDAQ	15,011.35	19,310.79	23,241.99	20.36%	###	###
S&P 500	4,769.83	5,881.63	6,845.50	16.39%	###	###
Prime Rate	8.50%	7.50%	6.75%	-10.00%	###	###
10-year Treasury	3.88%	4.58%	4.18%	-8.73%	###	###

Investing Beyond the Portfolio: *Anchor Impact Fund Awards First Grants*

As we celebrate our 25th anniversary this year, we have spent time reflecting on what it means to create lasting value. For a quarter century, our work has centered on helping clients build strong financial futures through thoughtful planning, disciplined investing and a long-term perspective. Those same principles inspired the creation of the Anchor Impact Fund, a new community giving initiative designed to invest in the future of the Midlands.

This spring, the Anchor Impact Fund completed its inaugural grant cycle, awarding a total of $12,000 to three local nonprofit organizations whose work is creating meaningful change across our community. The fund was established as part of our 25th anniversary celebration and reflects our longstanding belief that investments can generate returns far beyond financial markets.

The first recipients represent two distinct areas of impact: health and education.

EmmanuWheel

EmmanuWheel received funding to support its Meeting the Ongoing Need project, which provides ADA-compliant access ramps for individuals facing mobility challenges. Through this work, seniors, veterans and people with disabilities gain greater independence, safety and access to their homes.

Camp Discovery

Camp Discovery was selected for its project Engaging and Inspiring Through Discovery in Science and Nature. The funding will provide hands-on outdoor STEM learning experiences for 80 fourth-grade students at Jackson Creek Elementary School, helping bring classroom lessons to life through experiential learning.

Reading Is Power

Reading is Power received support for its Preschool Bilingual Home Libraries for Spanish-Speaking Families initiative. The program will provide bilingual home libraries to families with young children, encouraging literacy development, language skills and shared reading experiences that can have lifelong benefits.

For our team, these grants represent more than charitable contributions. They reflect the same values that guide our work with clients every day: intentional decision-making, long-term thinking and a commitment to building stronger futures.

Many of our clients have incorporated philanthropy into their own financial plans over the years. Whether through charitable giving strategies, legacy planning or donor-advised funds, we have seen firsthand how thoughtful generosity can create a lasting impact across generations. The Anchor Impact Fund allows our team to put those principles into practice in a direct and meaningful way.

In its inaugural year, the fund will distribute $25,000 through two grant cycles, supporting organizations focused on health, education, families and communities. We look forward to sharing updates on the progress of these projects and introducing recipients from our second grant cycle later this year.

As we celebrate 25 years of serving clients, we are grateful for the opportunity to support organizations that are improving lives across the Midlands. Just as successful investing requires patience and purpose, meaningful community impact is built one thoughtful investment at a time.

Team Highlights

We continue to grow, and we're pleased to welcome two new Client Service Associates to the team.

Janice Hall Nelson brings extensive experience in financial services, including leadership roles with First Citizens Bank. Her commitment to building trust, delivering exceptional service and helping clients stay focused on their long-term goals makes her a valuable addition to Anchor. Outside the office, Janice enjoys spending time with her family, shooting pool with her husband and relaxing in their backyard oasis.

Mary Grace Compton joins Anchor with a strong background in finance, analytics and risk management. A University of South Carolina graduate with dual degrees in Economics and Finance, she previously worked as a Financial Crimes Analyst and completed internships in both the public and private sectors. Mary Grace is passionate about continuous learning and enjoys exploring antique markets, reading and spending time with her two cats.

Please join us in welcoming Janice and Mary Grace to the Anchor team.

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At Anchor, our goal is to keep your best interests in mind as we follow trends and events that can impact the economy and your investments. Market declines are a normal part of investing and often present opportunities to buy quality companies at a discount. Long-term investment success depends on creating a financial plan and acting consistently on that plan. If you have any concerns about the year ahead, let's review your goals and make sure your investments are aligned with them.