



EQM-Emerita Blockchain BLOK 50 Global Index

BLOK-50

Table of Contents

- Introduction 3
 - Index Objective 3
 - Highlights 3
 - Dates 3
 - Supporting Documents 3
- Eligibility Criteria and Index Construction 3
 - Universe 3
- Index Construction 4
 - Constituent Selection 4
 - Constituent Weightings & Constraints 4
- Index Maintenance 5
 - Rebalancing and Reconstitution 5
 - Corporate Actions 5
 - Index Information 6
- Index Calculation 6
- Index Governance 6
- Index Policies 6
- Contact Information 6
- Disclaimer 6

Introduction

Index Objective

The EQM-Emerita Blockchain BLOK 50 Global Index tracks the performance of a portfolio of global companies engaged in blockchain technology.

Highlights

The index consists of 3 investment segments, Super-Core, Core, and Non-Core blockchain company segments with fixed segment weights.

Dates

- **Reference/Selection/Weight Date:** Five trading days prior to the close of trading on the third Wednesday in March, June, September, and December.
- **Reconstitution Dates:** Indexes are reconstituted quarterly at the close of trading on the third Wednesday in March, June, September, and December.
- **Rebalance Dates:** Indexes are rebalanced quarterly at the close of trading on the third Wednesday in March, June, September, and December.

Supporting Documents

This methodology is meant to be read in conjunction with supporting documents providing greater detail with respect to the policies, procedures and calculations described herein.

The list of the main supplemental documents for this methodology can be found in the Methodologies and Governance tabs on the [Index Resources](#) page as follows:

Supporting Documents
Index Maintenance Policy
Index Governance
Index Policies
Methodology Policies
Glossary
Index Change and Consultation Policy
VettaFi Country Classification System

Eligibility Criteria and Index Construction

Universe

Global companies listed on a regulated stock exchange in the form of shares tradable for foreign investors without restrictions. The securities must have adequate constituent liquidity and accessibility for an exchange-listed product as determined by the Index Provider. Only ADRs will be held for companies domiciled in emerging markets or those listed on small regional exchanges. Non-US

companies will be represented by U.S. exchange traded ADR versions if available, assuming they meet liquidity requirements, otherwise local shares will be utilized.

Index Construction

Constituent Selection

To be eligible for selection, constituents must have a market capitalization of 200 million USD (100 million USD for current constituents) and a 6 month ADTV (Average daily traded value) of 1 million USD (excluding exchange listed investment vehicles).

Securities are selected based on the following criteria:

- 1) Companies actively engaged in R&D, proof-of-concept testing, and/or implementation of blockchain technology.
- 2) Companies profiting from the demand for blockchain-based applications such as cryptocurrency and mining.
- 3) Companies partnering with and/or directly investing in companies that are actively engaged in the development and/or use of blockchain technology.
- 4) Member of multiple consortiums or groups dedicated to the exploration of blockchain technology use.

Once selected, companies are classified as Super-Core, Core, or Non-Core:

- (a) Companies are designated as Super-Core blockchain companies if they derive 100% of their revenue from crypto mining or crypto exchanges.
- (b) Companies are designated as Core blockchain companies if they derive significant direct revenue in an amount less than 100%, from blockchain-related business and/or are among the largest 5 investors in blockchain-engaged companies as defined by the Index provider.
- (c) Companies are designated as Non-Core blockchain companies if they directly invest or partner in blockchain technology companies, participate in multiple blockchain industry consortiums, and/or provide consulting services to companies actively engaged in the R&D, proof-of-concept testing, and/or implementation of blockchain technology

Constituent Weightings & Constraints

The blockchain segments have the following fixed weights:

Super-Core: 40%

Core: 30%

Non-Core: 30%

Within each blockchain segment constituents are equally weighted.

Index Maintenance

Rebalancing and Reconstitution

The Indexes are rebalanced on the “Rebalance Date” and additionally reconstituted on the “Reconstitution Date”. Pricing used in share weights used for reconstitutions are as of the “Weight Date”. Share weights for the rebalanced Indexes are computed as of the “Weight Date”. Changes to the Indexes related to the rebalances are as of the “Rebalance Date”. Additions are only made on reconstitution dates.

Corporate Actions

Please refer to the Index Maintenance Policy document for information on Corporate Action processing.

Index Information

Index history availability, base dates and base values are shown in the table below.

Index	Price Index	Base Date	Base Value	Total Return Index	Base Date	Base Value
EQM-Emerita Blockchain BLOK 50 Global Index	BLOK-50P	03/15/23	100	BLOK-50	12/31/15	100

Methodology Updates and Changes

Date	Version	Previous	New
Apr 2026	1.0.0	Version 7 – 15 September 2023	VettaFi is taking over as calculation agent. Methodology in VettaFi standard format.

Index Calculation

Please refer to the Index Maintenance Policy document for information on index calculations.

Index Governance

The index is governed and managed by a VettaFi Index Committee for the purpose of meeting the goals of the index. For more information, please refer to the Index Governance document.

Index Policies

Please refer to the Index Policies document for information regarding Announcements, Holiday Schedules, Unexpected Exchange Closures, and Recalculation Policy.

Contact Information

For any questions regarding an index, please contact: index.production@vettafi.com

Disclaimer

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