

Alamut Capital Advisors Inc.

Customer Relationship Summary (Form CRS) March 2026

Item 1. Introduction

Alamut Capital Advisors Inc. (“Alamut Capital” or the “Firm”) is an investment adviser registered with the U.S. Securities and Exchange Commission. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at <https://www.investor.gov/CRS>, which also provides educational materials about investment advisers, broker-dealers and investing.

Item 2. Relationships and Services

What investment services and advice can you provide me?

Alamut Capital provides discretionary investment advice and portfolio management services to individuals and small businesses, meaning we make investment decisions on your behalf without requiring prior approval for each trade. These services are available under different fee arrangements, including a percentage-of-assets fee structure and two separate fixed-fee wealth management offerings: Integrated Financial Management and Private Wealth Strategy. Integrated Financial Management includes financial planning, tax planning, estate planning coordination, and investment management. Private Wealth Strategy includes those services, along with additional planning for matters such as RSUs, concentrated equity positions, charitable giving strategy and liquidity event wealth planning. Our approach is tailored to your financial goals, investment objectives, and risk tolerance, ensuring that your portfolio aligns with your unique needs. We manage assets on a discretionary basis in accordance with the investment parameters set forth in the Client Advisory Agreement. In managing accounts, we currently use proprietary investment models developed by our parent company, Alamut Capital Investments, Inc. (“ACI”) although we may use other investments or solutions where appropriate for a client’s needs. Generally, we review Client accounts quarterly, and no less than annually, to assess consistency with the Client’s strategy and performance objectives. Clients may also impose reasonable investment restrictions in writing, allowing for a level of customization in their portfolios. There is currently no minimum account size requirement, though we reserve the right to establish one in the future.

Additional Information: For more detailed information about our investment advisory business please refer to Item 4 our Form ADV Part 2A (“Disclosure Brochure”), at <https://adviserinfo.sec.gov/> or <https://alamut.capital/>.

Ask your financial professional:

- ✓ Given my financial situation, should I choose an investment advisory service? Why or why not?
- ✓ How will you choose investments to recommend to me?
- ✓ What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?

Item 3. Fees, Costs, Conflicts, and Standard of Conduct

What fees will I pay?

Alamut Capital charges an annual management fee from 0.75% up to 1.50% with a maximum of \$7,500 a year based on the value of your assets under management, which is billed quarterly in arrears based on the balance in your account at the end of each quarter. We charge a fixed annual fee of \$10,000 for our Integrated Financial Management offering and \$13,000 for our Private Wealth Strategy offering, and we do not charge a separate asset-based advisory fee in connection with these services. These fees are billed in equal quarterly installments, in arrears. Other costs may include custodian and brokerage fees, such as wire transfer or account closure fees, as well as mutual fund and ETF expenses, which are separate from our advisory fees. Because our compensation is based on assets under management, we may have an incentive to encourage the growth of your account. However, we remain committed to acting in your best interest and managing your portfolio in alignment with your financial goals.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

Additional Information: For more detailed information about our fees please refer to Item 5 of our Disclosure Brochure. You may obtain a copy of our Disclosure Brochure at <https://adviserinfo.sec.gov/> or <https://alamut.capital/>.

Ask your financial professional:

- ✓ Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we are required to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are some examples to help you understand what this means:

- Our firm makes money from the management fees that you pay us for managing and servicing your account. Because we offer certain services for a fixed fee and not based on the value of your assets, you may pay more or less than you would under a different fee arrangement. We have an incentive to recommend the higher-priced fixed-fee service tier when we believe the additional services may be appropriate. We address this conflict by discussing the available fee options with clients, explaining the differences in services and cost, and recommending the arrangement we believe is most appropriate based on the client's needs and circumstances.
- We actively manage our own personal accounts while at the same time managing your accounts and other Client accounts.
- We currently use proprietary investment models developed by our parent company at no cost to us. This creates an incentive for us to continue using those affiliated models rather than alternatives made available by unaffiliated parties. We address this conflict through ongoing review and quarterly due diligence on model performance.

This creates different conflicts of interest for which we have developed procedures to controls to mitigate those conflicts.

Additional Information: For more detailed information about our conflicts of interest please refer to Item 9 of our Disclosure Brochure. You may obtain a copy of our Disclosure Brochure at <https://adviserinfo.sec.gov/> or <https://alamut.capital/>.

Ask your financial professional:

- ✓ How might your conflicts of interest affect me, and how will you address them?

How do your financial professionals make money?

Our financial professionals are paid a fixed salary and do not have any incentive-based compensation structures. All employees of Alamut Capital are eligible to receive a discretionary bonus, as determined by management. Compensation is not based on commissions or fees of any kind.

Item 4. Disciplinary History

Do you or your financial professionals have legal or disciplinary history?

No. Neither our firm nor our financial professionals have any legal, financial or other disciplinary items or history. Visit Investor.gov/CRS for a free and simple search tool to research you and your financial professionals.

Ask your financial professional:

- ✓ As a financial professional, do you have any disciplinary history? For what type of conduct?

Item 5. Additional Information

Additional information about Alamut Capital is available at <https://alamut.capital/>. You can also find our disclosure brochures and other information about us at <https://adviserinfo.sec.gov/> or <https://alamut.capital/>. If you would like additional, up-to-date information or a copy of this disclosure, please call (647) 574-4093 or send an email to invest@alamut.capital.com.

Ask your financial professional:

- ✓ Who is my primary contact person? Is he or she a representative of an investment adviser or broker-dealer? Who can I talk to if I have concerns about how this person is treating me?

Material Changes:

Item 2. Relationships and Services

- This section was revised to describe two new service offerings.

Item 3. Fees, Costs, Conflicts, and Standard of Conduct

- This section was revised to disclose the fee structure applicable to the new service offerings and related conflicts of interest. This section was also revised to disclose conflicts associated with the use of investment models developed by our parent company.