

## KEY FEATURES

**Objective** - To achieve consistent long-term growth while protecting capital by investing primarily in North American Equities.

**Time Horizon & Risk** - Long-Term, Moderate Risk

## STRATEGY OVERVIEW

**Investment Approach** - Focused portfolio of 15 to 20 of our best ideas.

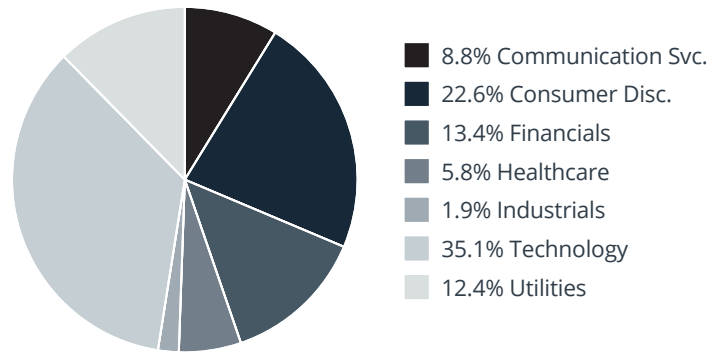
**Investment Styles** - GARP - Growth at a reasonable price.

Fundamental focus on best-in-class companies.

Exceptional management team with a proven track record of adding shareholder value.

Emphasis on predictable top and bottom-line growth in sectors with favourable long-term macroeconomic factors.

## SECTOR ALLOCATION



## ANNUALIZED RETURNS

3M	6M	1Y	3Y	5Y	Since Inception
4.6%	15.4%	42.5%	13.2%	-	22.0%

## CALENDAR RETURNS

YTD	2023	2022	2021	2020	2019
31.1%	40.0%	(27.7%)	28.5%	-	-

## HISTORICAL GROWTH OF \$100,000

