

KEY FEATURES

Objective – To achieve a combination of consistent growth and capital preservation through a long-term investment in a conservative mix of Blue-Chip North American Equities.

Time Horizon & Risk – Long-Term, Moderate Risk.

STRATEGY OVERVIEW

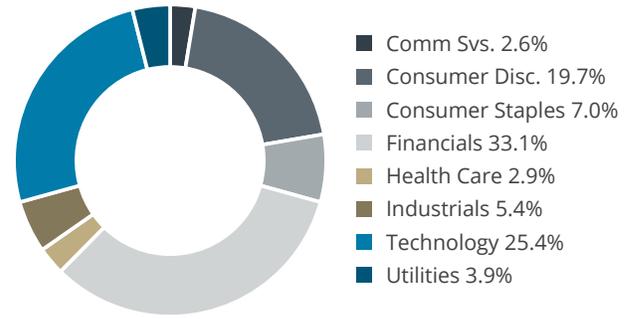
Investment Approach – Growth at a reasonable price.

Emphasis on portfolio diversification (25-35 Holdings).

Exceptional management teams with a proven track record.

Fundamentals – Driven selection seeking sustainable earnings, resilient balance sheets and a history of profitability.

SECTOR ALLOCATION



ANNUALIZED RETURNS

3M	6M	1Y	3Y	5Y	Since Inception
5.1%	17.8%	17.5%	28.2%	14.3%	15.2%

CALENDAR RETURNS

YTD	2024	2023	2022	2021	2020
17.5%	43.7%	27.3%	-26.6%	26.0%	19.0%

HISTORICAL GROWTH OF \$100,000



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