

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

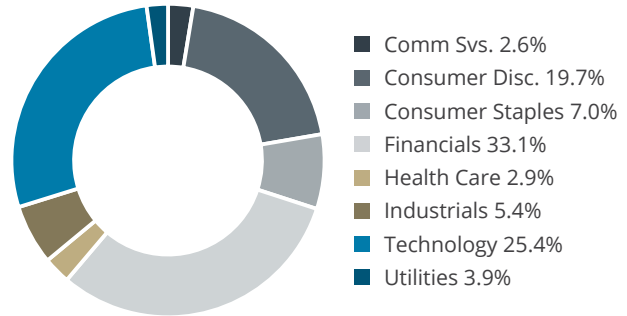
Investment Approach – Growth at a reasonable price.

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
(5.4%)	(0.6%)	22.3%	21.0%	11.8%	14.3%

CALENDAR RETURNS

YTD	2025	2024	2023	2022	2021
(5.4%)	17.5%	43.7%	27.3%	(26.6%)	26.0%

HISTORICAL GROWTH OF \$100,000



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