WELLINGTON-ALTUS PRIVATE WEALTH

HALE INVESTMENT GROUP

Canadian Dividend

As of September 30, 2026

Key Features

Objective – To achieve a combination of sustainable dividend income and long-term capital preservation through active investment in a diversified mix of primarily dividend paying Canadian Equities.

Time Horizon & Risk – Mid to Long-Term, Moderate Risk

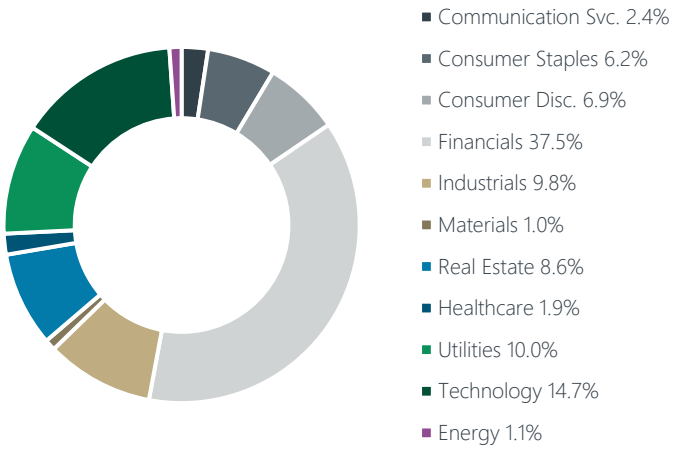
Strategy Overview

Investment Approach – Value & growth at a reasonable price.

Fundamental analysis with a focus on stable cash flow generation and companies that can maintain and grow their dividends over the long term.

Companies with resilient balance sheets, a history of profitability, and management with a strong track record.

Sector Allocation



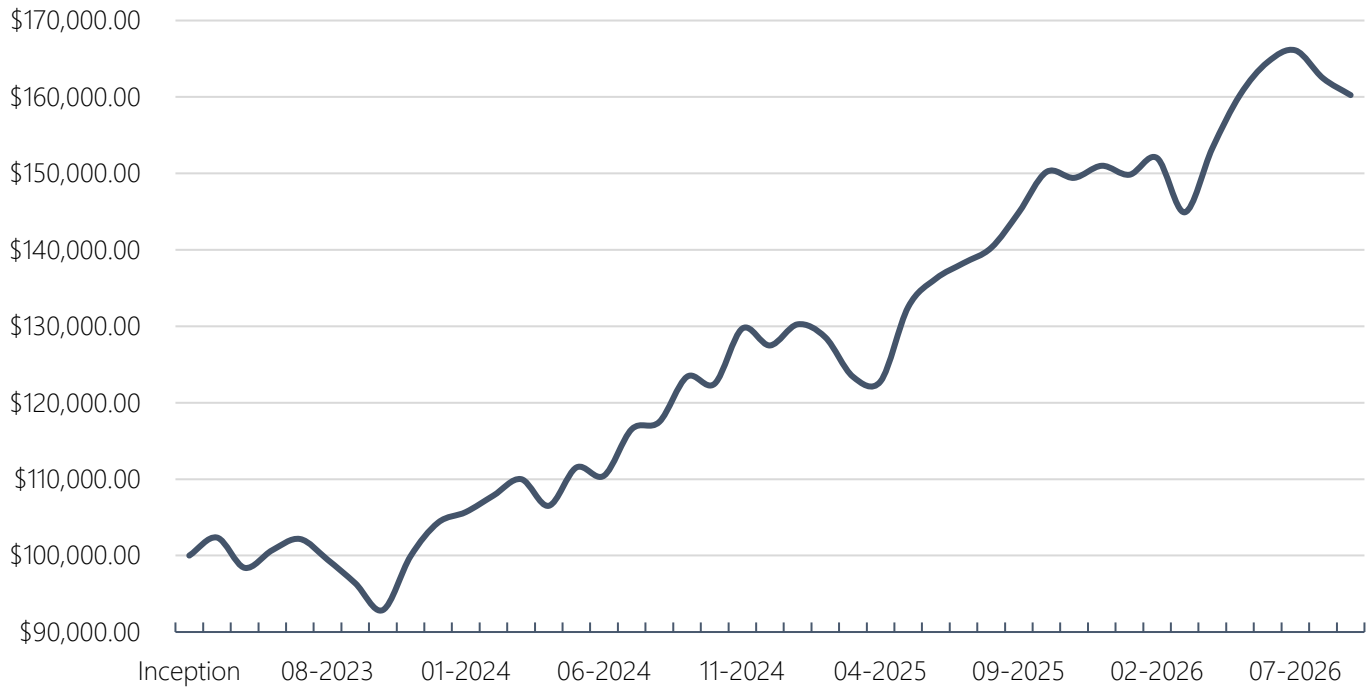
Annualized Returns

3M	6M	1Y	3Y	5Y	Since Inception
(2.6%)	10.6%	10.6%	18.5%	-	14.4%

Calendar Returns

YTD	2025	2024	2023	2022	2021
6.1%	18.4%	22.2%	4.3%	-	-

Historical Growth of $100,000



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