

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 – A portfolio of 15 to 20 of our best ideas, focused on long-term growth.

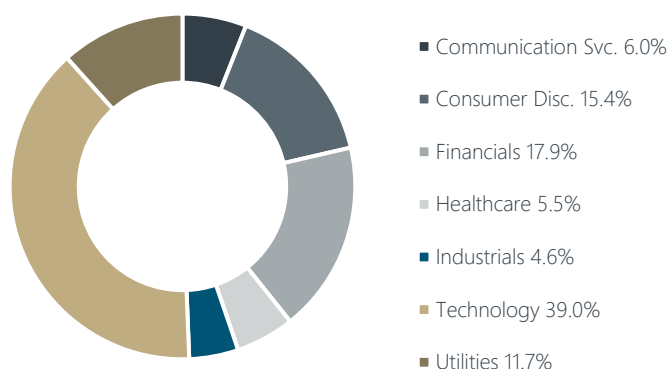
Investment Styles – GARP - Growth at a reasonable price.

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
1.0 %	35.8%	40.4%	35.6%	20.5	25.1%

Calendar Returns

YTD	2025	2024	2023	2022	2021
31.3%	19.1%	46.6%	40.0%	(27.7%)	28.5%

Historical Growth of \$100,000

