Standard Wealth

Helping Families Stay Wealthy

As of October 31, 2025

Standard Wealth Overview

Since February 2020, Standard Wealth has offered professional asset management services to high net-worth clients via a separately managed account platform.

1 Month	3 Months	YTD	1 Year	3 Years	5 Years	Inception
1.0%	7.2%	15.8%	19.4%	18.8%	20.5%	15.1%

Investment Objectives

Four Pillar Strategy

- North American equity and liquid alternative portfolio
- Dividend income
- Disciplined use of leverage
- Performance oriented fee structure

Monthly Returns Net of Fees and Expenses

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2020			-18.0%	11.6%	1.9%	-0.3%	-2.1%	2.9%	-6.1%	-0.3%	21.9%	2.0%	**8.9%**
2021	4.0%	10.0%	2.7%	1.9%	2.2%	3.5%	-2.1%	1.9%	-3.4%	5.2%	-0.4%	2.8%	**31.5%**
2022	1.4%	0.1%	0.3%	-2.7%	2.7%	-13.2%	7.4%	-3.3%	-9.0%	10.9%	6.1%	-8.8%	**-10.4%**
2023	8.4%	-2.9%	-0.1%	2.0%	-4.2%	2.9%	8.4%	1.5%	-1.4%	-3.6%	4.2%	2.9%	**18.6%**
2024	1.3%	4.5%	4.3%	-1.9%	1.9%	-0.5%	5.6%	-1.1%	0.8%	5.7%	6.7%	-3.4%	**26.0%**
2025	4.7%	-3.2%	-4.4%	-4.8%	7.4%	3.1%	5.8%	3.2%	2.9%	1.0%			**15.8%**

Growth of C$ 10M from Inception

STANDARD WEALTH: BY FRED MANNIX