



# Standard Wealth

Helping Families Stay Wealthy

As of December 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
-0.1%	5.0%	20.3%	20.3%	21.6%	16.2%	15.4%

## 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
<b>2020</b>			-18.0%	11.6%	1.9%	-0.3%	-2.1%	2.9%	-6.1%	-0.3%	21.9%	2.0%	<b>8.9%</b>
<b>2021</b>	4.0%	10.0%	2.7%	1.9%	2.2%	3.5%	-2.1%	1.9%	-3.4%	5.2%	-0.4%	2.8%	<b>31.5%</b>
<b>2022</b>	1.4%	0.1%	0.3%	-2.7%	2.7%	-13.2%	7.4%	-3.3%	-9.0%	10.9%	6.1%	-8.8%	<b>-10.4%</b>
<b>2023</b>	8.4%	-2.9%	-0.1%	2.0%	-4.2%	2.9%	8.4%	1.5%	-1.4%	-3.6%	4.2%	2.9%	<b>18.6%</b>
<b>2024</b>	1.3%	4.5%	4.3%	-1.9%	1.9%	-0.5%	5.6%	-1.1%	0.8%	5.7%	6.7%	-3.4%	<b>26.0%</b>
<b>2025</b>	4.7%	-3.2%	-4.4%	-4.8%	7.4%	3.1%	5.8%	3.2%	2.9%	1.1%	3.9%	-0.1%	<b>20.3%</b>

## Growth of C\$ 10M from Inception

