



# Standard Wealth

Helping Families Stay Wealthy

As of January 31, 2026

## 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.

### Target Investor

Designed for family offices, endowments, foundations, and high-net-worth investors seeking a single-ticket, total portfolio solution.

1 Month	3 Months	YTD	1 Year	3 Years	5 Years	Inception
2.7%	6.7%	2.7%	18.0%	19.4%	15.9%	15.7%

### 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>
<b>2026</b>	2.7%												<b>2.7%</b>

### Growth of C\$ 10M from Inception



**DISCLAIMER:** The provided performance figures are net investment returns which include fees and expenses charged to fee-paying accounts. The information in this summary does not constitute investment, legal or tax advice. Past performance is not indicative of future results. Any data provided in this summary should not be viewed as a recommendation or solicitation of an offer to buy or sell any securities or investment strategies. This information is based on prevailing market conditions and is not predictive of future performance. Standard Wealth and Accelerate Financial Technologies Inc. do not accept any liability for any direct, indirect or consequential loss or damage suffered by any person as a result of relying on all or any part of this information and any liability is expressly disclaimed.

