

BLOSTEIN-BEUMER INVESTMENT GROUP

## TACTICAL BALANCED

March 31, 2026

### Investment objective

This portfolio focuses on disciplined long-term investments, to achieve a mix of income and growth across various sectors.

### Investment profile

The portfolio is managed using a disciplined and active investment process with a bottom-up approach for stock selection.

### Investment strategy

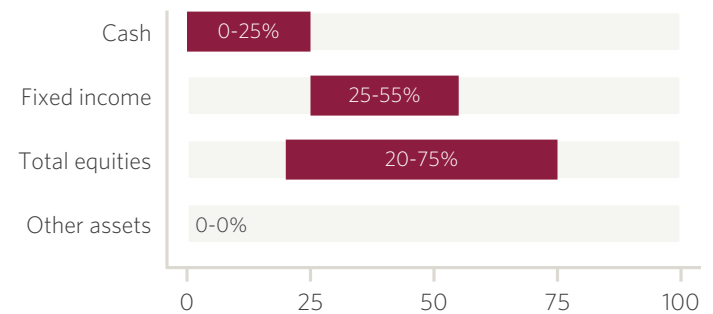
Well-researched/high-quality companies-strong fundamentals factors:

- Stable businesses with good growth prospects
- Sound financial condition-good history of profitability
- Attractive dividend payment record
- Successful and experienced management

### Portfolio facts

Investment manager: Stacey H. Beumer  
 Investment approach: Fundamental & Technical  
 Return objective: Income & Growth  
 Risk profile: Moderate  
 Portfolio inception: January 1, 2012  
 Benchmark: 60% S&P/TSX Composite Index; 35% FTSE Canada Universe Bond Index; 5% FTSE Canada 91 Day T-Bill Index

### Asset allocation



### Annualized returns

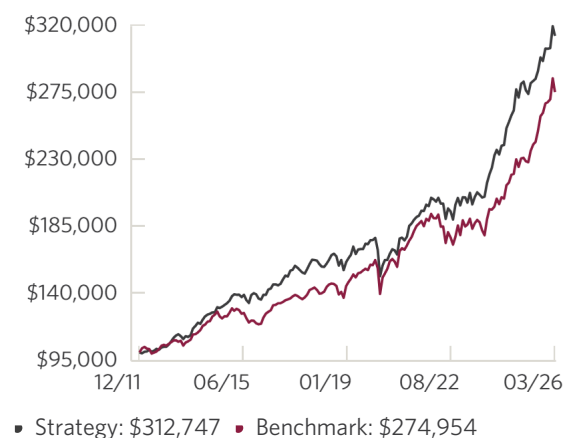
Performance (%)	3 Mths	6 Mths	1 Yr	3 Yrs	5 Yrs	10 Yrs	Since inception
<b>Strategy</b>	2.9	4.8	13.2	15.9	11.1	8.5	8.3
<b>Benchmark</b>	2.5	6.2	20.3	13.9	9.4	8.3	7.4

### Calendar year returns

Performance (%)	YTD	2025	2024	2023	2022	2021	2020	2019
<b>Strategy</b>	2.9	12.1	23.5	10.5	-2.5	15.1	0.9	13.0
<b>Benchmark</b>	2.5	19.4	14.5	9.7	-7.4	13.5	7.1	16.1

Performance shown in Canadian dollars before the deduction of fees and expenses.

### Growth of \$100,000



Performance returns are based on composite of CIBC Wood Gundy Advisor Managed Accounts ("AMA") invested in an investment strategy managed by the AMA Portfolio Manager.

The performance returns are geometrically linked and calculated by weighting each account's monthly performance against its market value at the beginning of each month as represented by the market value at the opening of the first business day of each month. Performance returns are gross of investment management fees, and other expenses, if any.

Individual AMA performance results may differ from those in this document due to the above and other factors such as an account's size, the length of time an AMA strategy has been held, cash flows in and out of the individual account, trade execution timing, market conditions and movements, trading prices, foreign exchange rates, specific client constraints, and constraints against purchasing securities of related and connected issuers to CIBC Wood Gundy.

Past performance may not be repeated and is not indicative of future results. This document is prepared for informational purposes only and is subject to change without notice.

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