

Capital Preservation Portfolio

Monthly performance: October 2019

RICHARDSONGMP
THE COURTEAU
WEALTH MANAGEMENT TEAM

CPP +10.65% year to date

Market and portfolio update

Despite a drop in the S&P/TSX Composite (which fell by -0.9%) our Capital Preservation Portfolio rose +0.71% in the month of October, resulting in a YTD return of 10.65%. The positive returns in October reflect the rise in The S&P 500 of +2.2% and our exposure to Gold which had a healthy gain of +2.9% for the month. Once again the merits of a well-diversified portfolio are on full display!

Capital Preservation Portfolio

Performance since inception: 30.08% (July 2013 – October 2019)



Investment	Cumulative Return %	Annualized Return %	Amount at End of Period \$
① Capital Preservation Portfolio 2019 (CAD)*	30.08	4.51	1,300,837.75
② S&P/TSX Composite TR (CAD)	44.05	6.45	1,440,493.65

Return	Jan.	Feb.	March	Apr.	May	June	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2019	1.98%	1.34%	1.52%	1.66%	-1.56%	2.11%	0.70%	1.42%	-0.33%	0.71%	—	—	10.65%
2018	0.48%	-0.34%	0.28%	-0.45%	0.81%	0.58%	0.04%	-0.24%	-0.87%	-2.50%	1.04%	-0.61%	-0.92%
2017	0.52%	1.93%	0.46%	2.01%	0.09%	-1.86%	-1.02%	1.47%	-0.09%	2.17%	0.61%	-0.28%	6.11%
2016	-0.77%	-0.47%	0.96%	0.59%	1.51%	1.07%	3.15%	0.20%	0.65%	-0.06%	-1.57%	0.21%	5.54%
2015	3.63%	0.27%	-0.25%	-0.27%	1.22%	-0.77%	-0.68%	-0.65%	-1.14%	1.19%	-0.39%	0.46%	2.62%
2014	1.43%	3.08%	-0.91%	0.14%	0.15%	3.16%	-1.38%	0.80%	-2.97%	-1.71%	1.16%	0.54%	3.49%

Regards,

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