

Building your financial future

# Cordeau Lemay Wealth Advisory

December 2023



## Bye Bye 2023

Happy December everyone, this financial letter will be shorter than the previous ones.

November was a good month for both the stock and bond markets. Morale is very good. By referring to previous financial letters, you will see that this was not a surprise to us. We have been expecting this for several months.

To prepare you for the holiday season as well as the start of 2024, we have produced 2 video clips with Michel Villa, expert in financial psychology. We invite you to listen to them. Lasting less than 20 minutes each, we answer 4 questions that concern the majority of you. We will send them to you by email.

We hope you enjoy it and leave us your comments in our team email box (cordeaulemay@nbc.ca).

With that, the entire Cordeau-Lemay team wishes you a happy holiday season and we will be back in January 2024 with a quarterly financial letter.

Phil

## Trading Information

### CL Disciplined Growth

<b>Symbol:</b>	NBN 1550
<b>Fund Launch Date:</b>	January 15, 2021
<b>Portfolio Manager:</b>	Philippe Cordeau
<b>Distribution Frequency:</b>	Quarterly
<b>Number of Holdings:</b>	60
<b>Dividend Yield:</b>	1,92%

### Performance November 30, 2023

	1 month	3 months	1 year
NBN1550	4,41 %	-2,38 %	4,65 %
Benchmark*	6,04 %	1,59 %	7,79 %
Percentile Rank**	78	90	46

Sources: MorningStar, Croesus

\*Benchmark: 5% FTSE Canada T-Bill 91 days, 10% FTSE Canada Universal Bonds, 30% S&P/TSX TR, 30% S&P500 \$CAD TR, 15% MSCI EAEO \$CAD TR and 10% NBF Alternative

\*\*Morningstar Category: North America Equities

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