

Canadian Growth & Income Private Portfolio

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Investment Strategy

Risk management and portfolio diversification are key

Seeking high quality company with strong management teams

Seeking companies that pay stable & growing dividends

Willing to pay for some growth potential but at a reasonable price

May occasionally take advantage of tactical opportunities to overweight or underweight certain sectors

Who is this Investment For?

Seeking diversified Canadian equity exposure

Willing to tolerate a moderate level of risk with a minimum time horizon of 5 years

Seeking tax efficient income

Portfolio Holdings

Issuer	Sector	Weight
Purpose High Interest Savings ETF	Cash	15.21%
Alimentation Couche-Tard	Consumer Discretionary	6.38%
Brookfield Infrastructure	Infrastructure	9.33%
Enbridge	Energy	4.99%
H&R Reit	Real Estate	5.73%
Innergex Renewable	Utilities	5.44%
National Bank	Financials	5.86%
Northland Power	Utilities	6.03%
Open Text	Information Technology	6.74%
Parkland Fuel	Energy	6.02%
Pembina Pipe	Energy	5.62%
Royal Bank	Financials	5.58%
TD Bank	Financials	5.74%
Telus	Communication Services	5.55%
Waste Connections	Support Services	3.82%
Whitecap Resources	Energy	1.96%



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WEALTH MANAGEMENT

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