

Building your financial future

Cordeau Lemay Wealth Advisory


Fébruary 2025



2025 Youtube

The markets were particularly volatile in January, a phenomenon which could well continue in 2025. Our more modest performance at the start of the year can be explained by the fact that our portfolio is not mainly exposed to the United States, unlike our benchmark index which is.

Volatility rhymes with opportunities. We are ready to take advantage of these fluctuations.

We invite you to subscribe to our YouTube  channel, where we will share informative videos, analyzes and explanations on various finance-related topics. All you have to do is click on this image in the signature of this email.

Happy winter!

Phil

P.S.: Here's what you find at the bottom of our emails



Trading Information

CL Disciplined Growth

Symbol:	NBN 1550
Fund Launch Date:	January 15, 2021
Portfolio Manager:	Philippe Cordeau
Distribution Frequency:	Quarterly
Morningstar Rating™	☆☆☆
Number of Holdings:	57
Management fee :	0.20%
Dividend Yield:	1.56%

Sources : Morningstar, Croesus

Performance November 30, 2023

	1 month	3 months	1 year	3 years	Since Inception
NBN1550	-0.16%	6.39%	24.56%	11.49%	13.38%
Benchmark*	3.31%	6.49%	24.28%	11.14%	-
Percentile Rank**	100	58	40	37	-

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 EAO \$CAD TR and 10% NBF Alternative

**Morningstar Category: North America Equities

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