

Building your financial future

Team Chartier, Grandmaison

Wealth Management Advisors
and Portfolio Managers



2nd Quarter 2018 Summary

Asset Allocation Strategy

No changes were made to the asset allocation targets during the last quarter. In our opinion, it was well positioned to take advantage of market opportunities.

Portfolio Model Revisions

We have not added new positions to the model portfolio nor have we eliminated existing positions. The only purchases and sales that might have taken place, in certain portfolios were due to personalized rebalancing.

2nd Quarter 2018 Highlights

Financial markets continued to cope with fears of a trade war between the United States and their major partners, and with the threats of measures, counter-measures, etc. thrown at each other. However, the strength of the global economy and strong earnings reported by companies outweighed these fears and returns were positive during the quarter.

"A goal without a plan is just a wish." – *Antoine de Saint-Exupéry*