

A photograph of a man and a woman standing on a beach at sunset, looking out at the ocean. A black dog is sitting on the sand in the foreground. The sky is filled with dramatic, colorful clouds in shades of orange, red, and blue. The water reflects the colors of the sky.

Canaccord Genuity GPS

OPTIMIZED PORTFOLIOS

Returns include peace of mind.

CANACCORD Genuity
Wealth Management

To us there are no foreign markets.™

N49°18'1"
W121°47'7"

INVESTMENT OUTCOME
SUPERHERO MOM
HARRISON HOT SPRINGS,
BRITISH COLUMBIA

Returns include peace of mind

Your life has a geography. Where you're from, where you're going, where you aspire to be. More often than not, that geography is global.

GPS Optimized Portfolios get you to where you want to go – with peace of mind.

Our Optimized Portfolios, part of Canaccord Genuity Global Portfolio Solutions (GPS), use a forward-looking proprietary process that analyzes risks and global opportunities, aiming to provide you with steadier returns and more certainty. So that the path to achieving your financial goals doesn't get in the way of enjoying life itself.

Once you've chosen the destination, we can help to make the journey smoother. GPS Optimized Portfolios use an innovative approach to investing that looks forward, not backward, to anticipate market stress and adjust to deliver a more comfortable ride.

CANACCORD
GENUITY



GLOBAL
PORTFOLIO
SOLUTIONS

Global expertise from Canaccord Genuity

Canaccord Genuity Wealth Management is a premier independent global wealth management firm. Founded in Canada in 1950, today we serve successful businesses and families in major cities around the world, including in Canada, the UK and Australia.

GPS Optimized Portfolios provide investors with global perspectives, global insights and global investment opportunities.

GPS Optimized Portfolios investors benefit from direct access to:

- An award-winning investment process implemented by disciplined portfolio managers who skillfully execute global asset allocation strategies
- A proprietary risk management framework that looks forward to evaluate and adjust to an appropriate level of risk
- A top-ranked research team that identifies global investment ideas and opportunities

The rigorous process underlying GPS Optimized Portfolios has been internationally recognized as a best-in-class investing discipline. In the UK, Canaccord Genuity Wealth Management's successful investment strategy based on the same model received the Gold Standard Award for Discretionary Portfolio Management in 2012 and 2013, as well as a five-star rating by independent research firm Defaqto.

The evolution of risk management

GPS Optimized Portfolios use a forward-looking process to evaluate risk, providing a truly unique investment opportunity.

To help you navigate a smoother, more confident path to your financial future, we have developed a Market Stress Indicator (MSI) that enables us to prepare for upcoming risks and reduce the potential for capital loss.

Unlike traditional asset allocation models, which base decisions on past performance, our proprietary MSI – the risk-measuring model behind GPS Optimized Portfolios – focuses analysis on market events that affect the future. The objective of our forward-looking, dynamic asset allocation is to anticipate periods of significant market volatility and adjust to protect capital, guiding investors towards steadier returns with more certainty.

The GPS Optimized Portfolios advantage

Features

- Global expertise from Canaccord Genuity thought leaders
- Innovative, forward-looking risk management framework
- Sophisticated approach to portfolio diversification
- Award-winning investment process designed to cap volatility

Benefits

- Direct access to global investment ideas and opportunities
- More certainty for your investments during periods of market volatility
- The power to reduce the potential for capital loss
- A smoother, more confident path toward achieving your investment objectives

A smoother path to financial security

Whatever destination you have in mind for your life and your wealth, you expect your investment portfolio to keep you on course. We recognize that capital preservation is the cornerstone of a complete investment strategy.

That's why the innovative approach behind GPS Optimized Portfolios aims to insulate the core of your investments from dramatic market highs and lows, protecting your capital.

By carefully monitoring day-to-day volatility and correlations across asset classes worldwide, GPS Optimized Portfolios adjust to help you achieve your investment objectives with more certainty while endeavouring to cap risk, and therefore reduce the potential for loss, at the level best suited to you.

As illustrated below, research tells us that, over the long term, it is far more important for investors to avoid the worst market losses than it is to capture the largest gains. With this in mind, GPS Optimized Portfolios don't try to time the market. Instead, they help to get you out of harm's way, giving you peace of mind when periods of intense volatility are approaching.

Avoiding the losses vs. avoiding the gains



Source: DataStream, Canaccord Genuity Wealth Management.

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W118°30'44"

INVESTMENT OUTCOME
CALIFORNIA DREAMIN'
PACIFIC PALISADES



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GPS Optimized Portfolios investment philosophy and methodology

Philosophy

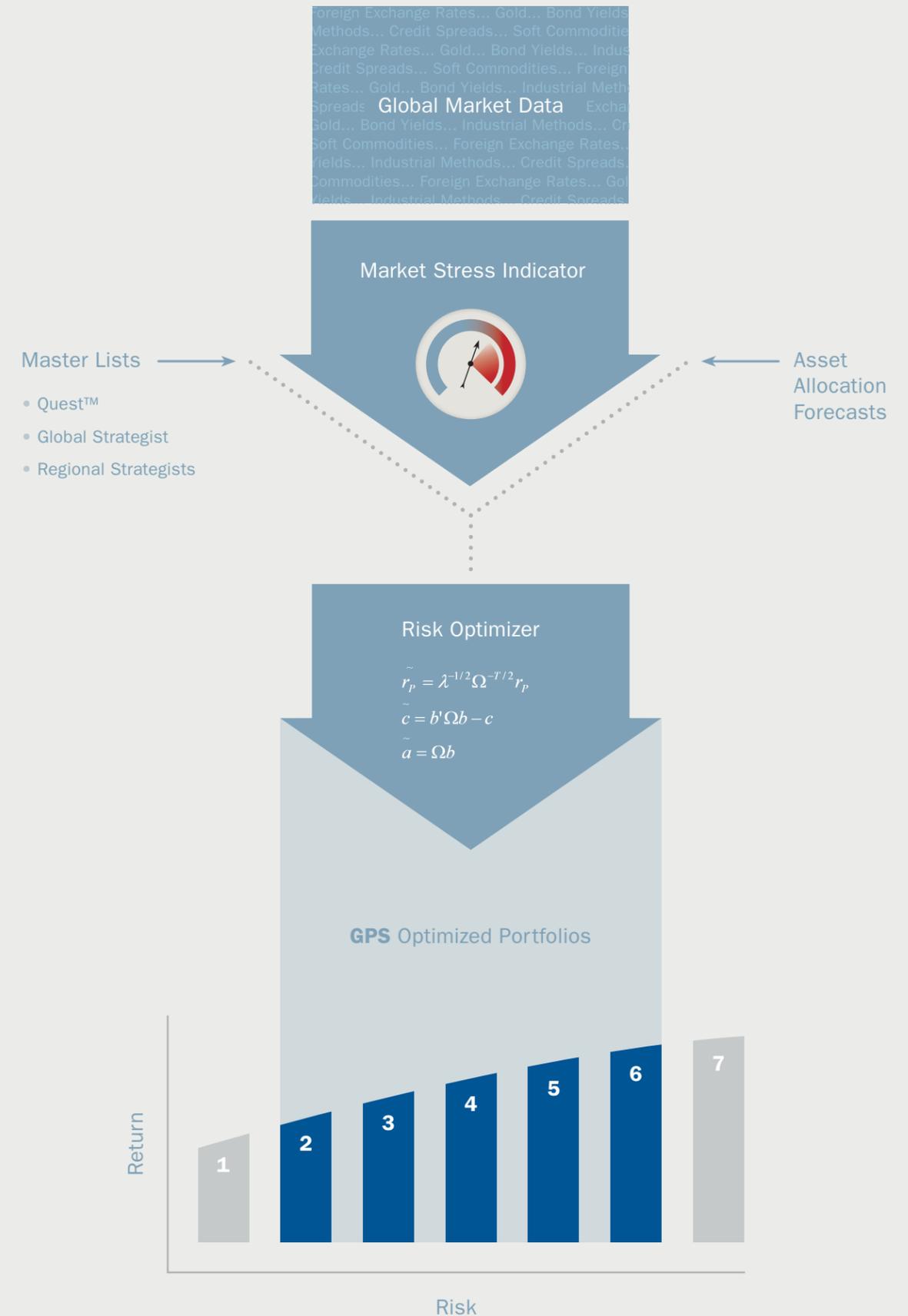
- We aim to grow our clients' wealth but with a focus on limiting capital loss.
- We aim to avoid the largest losses and benefit from compounding smaller, lower-risk gains.
- We believe that asset allocation is the main driver of investment returns.
- We believe in being accessible to clients and providing clear, transparent investment information.

Methodology

Traditional investment management relies on historical measures of risk that can underestimate a portfolio's exposure to capital loss in times of market stress. GPS Optimized Portfolios use a sophisticated, forward-looking process that overcomes these problems.

Our dynamic portfolio positioning ensures that your asset allocation is boldly cautious during periods of financial turbulence while still adhering to your overall tolerance for risk. As rising risk is identified in a portfolio, it is rebalanced away from the benchmark asset allocation towards safer asset classes in order to reduce the potential for capital loss.

GPS Optimized Portfolios Investment Process



Take greater control over market volatility

GPS Optimized Portfolios uniquely focus on risk rather than return. Your Canaccord Genuity Wealth Management Investment Advisor will recommend a GPS Optimized Portfolio that is customized to meet your financial objectives within the level of risk that's right for you.

GPS Optimized Portfolios:
Returns include peace of mind.

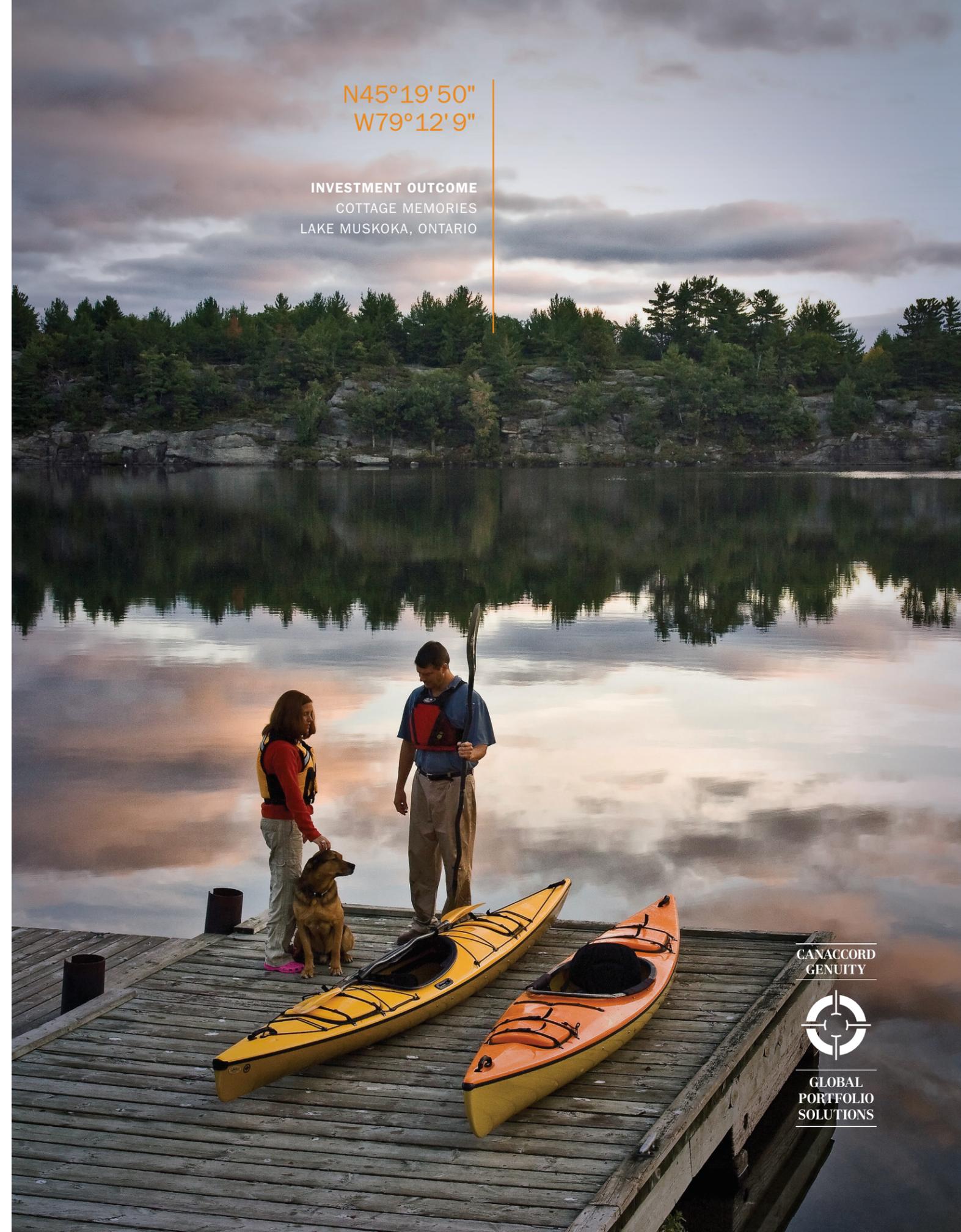
Over time, as your personal, professional and family circumstances change, your advisor will work with you to adjust your strategy, ensuring that it is always positioned within your tolerance for risk and thus delivering greater peace of mind.

Contact your Canaccord Genuity Wealth Management Investment Advisor to learn more about how GPS Optimized Portfolios can complement your wealth strategy and provide you with a powerful tool for managing volatility and risk.

canaccordgenuitygps.com

N45°19'50"
W79°12'9"

INVESTMENT OUTCOME
COTTAGE MEMORIES
LAKE MUSKOKA, ONTARIO



CANACCORD
GENUITY



GLOBAL
PORTFOLIO
SOLUTIONS

Australia

Canada

China

France

Germany

Guernsey

Ireland

Isle of Man

Jersey

Singapore

United States

United Kingdom

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Member – Canadian Investor Protection Fund

Member of all Canadian stock exchanges and the Investment Industry Regulatory Organization of Canada

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