



## Managed Portfolios

**The Newton Group  
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We believe strongly that long-term investing is the best way to beat the market. Our definition of long-term investing, however, is anything but conventional. We think that long-term adherence to an investment strategy is far more important than holding a stock for a period of years. We employ a rigorous screening and research process in selecting securities, and carefully monitor positions in the portfolios for material changes to ensure we are able to take advantage of changing opportunities and to avoid risk.

### Newton Group Cash Flow Portfolio

The Newton Group Cash Flow Portfolio is designed to provide safe, consistent income, superior to that from bank deposits, GICs, or pure bond portfolios, and to avoid correlation with equity markets. Distributions are in the form of interest, dividend income, and return of capital, generated through investments in bonds, preferred shares, common shares, REITs and income trusts.

### Newton Group Balanced Growth Portfolio

The Newton Group Balanced Growth Portfolio aims to provide the growth potential of an equity portfolio while reducing the potential impact of severe market corrections. We are able to do this with a concentrated portfolio of companies that we feel have the best potential for growth, maintaining carefully monitored stop losses, and including high-quality yield generating securities for stability.

### Newton Group US Portfolio

The objective of the Newton Group US Dollar Portfolio is to focus on large US-listed growth opportunities in the context of the Canadian investor, with an emphasis on innovative opportunities and intellectual property not available in the domestic markets.

### Newton Group Aggressive Alpha Portfolio

The Newton Group Aggressive Alpha Portfolio strives to achieve returns in all market conditions by using hedging strategies, long and short equity holdings, and economic forecasting with a focus on growth. We aim for a low correlation with equity markets and maintain high standards for risk management through continuous monitoring and the use of stop losses.

### Newton Group Double 20 Portfolio

The Newton Group Double 20 Portfolio is designed for investors seeking style diversification amongst a portfolio of North American stocks. Additionally, this portfolio harnesses an important tenant – that prices often move first and fundamentals come second.