

Understanding Your Investment Performance

There are different ways to measure returns for assets. Understand which method is being used when reviewing your investment performance.

YOUR RATE OF RETURN

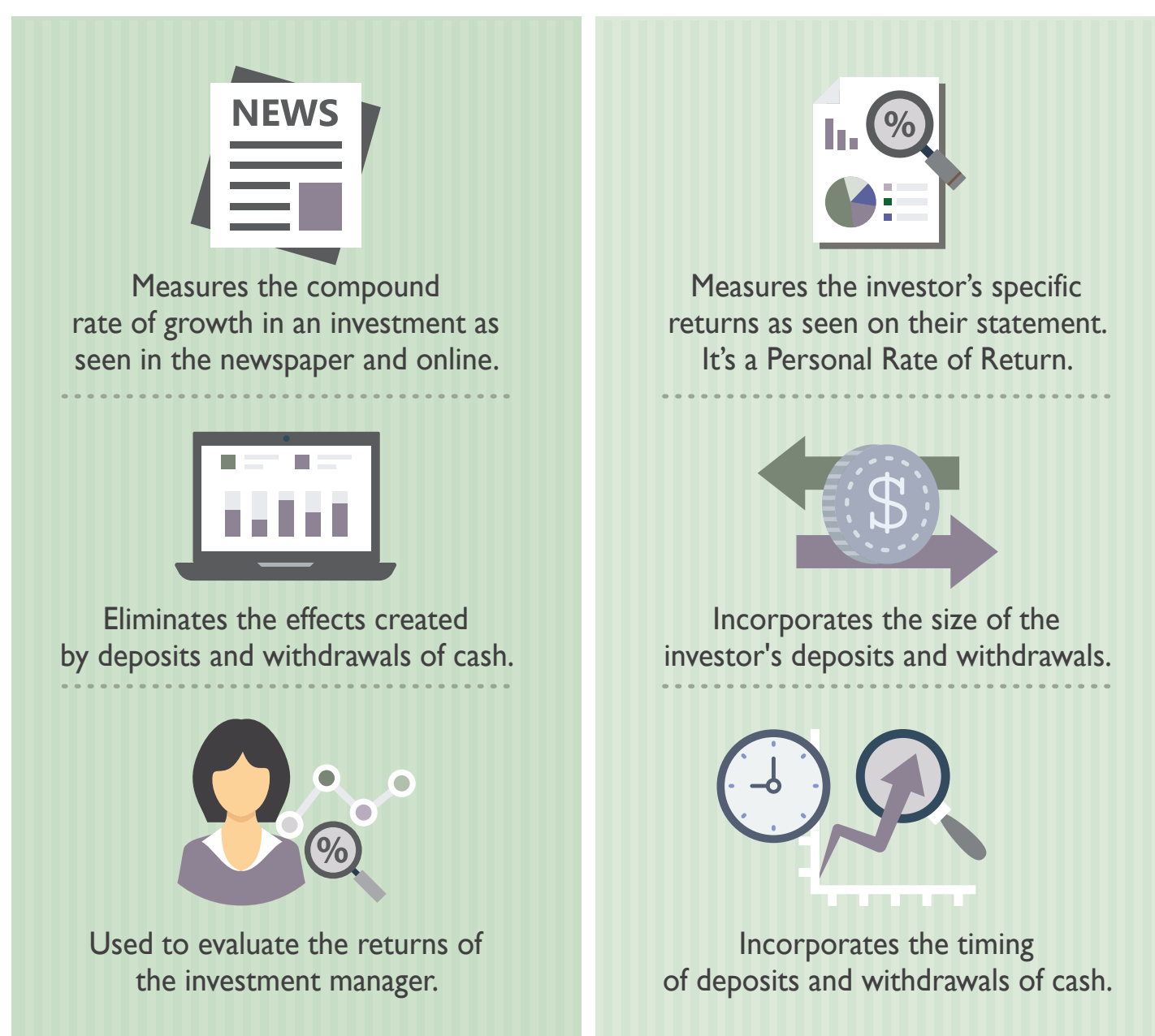


REVIEWING YOUR RETURNS

There are a number of ways to calculate an investment rate of return. Time-Weighted and Money-Weighted are two calculation methods that investors see when looking at their asset performance.

Time-Weighted Return (TWR)

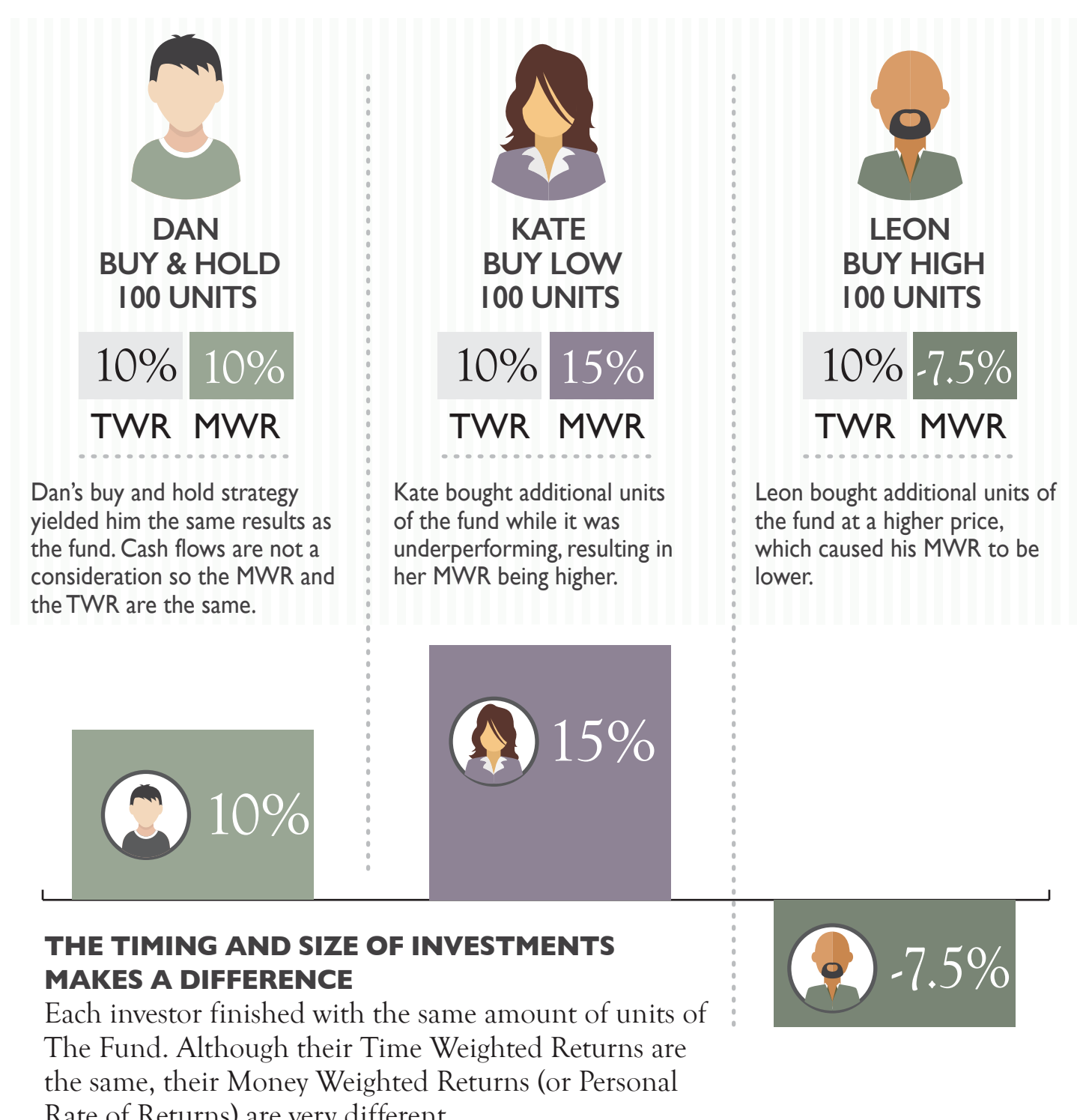
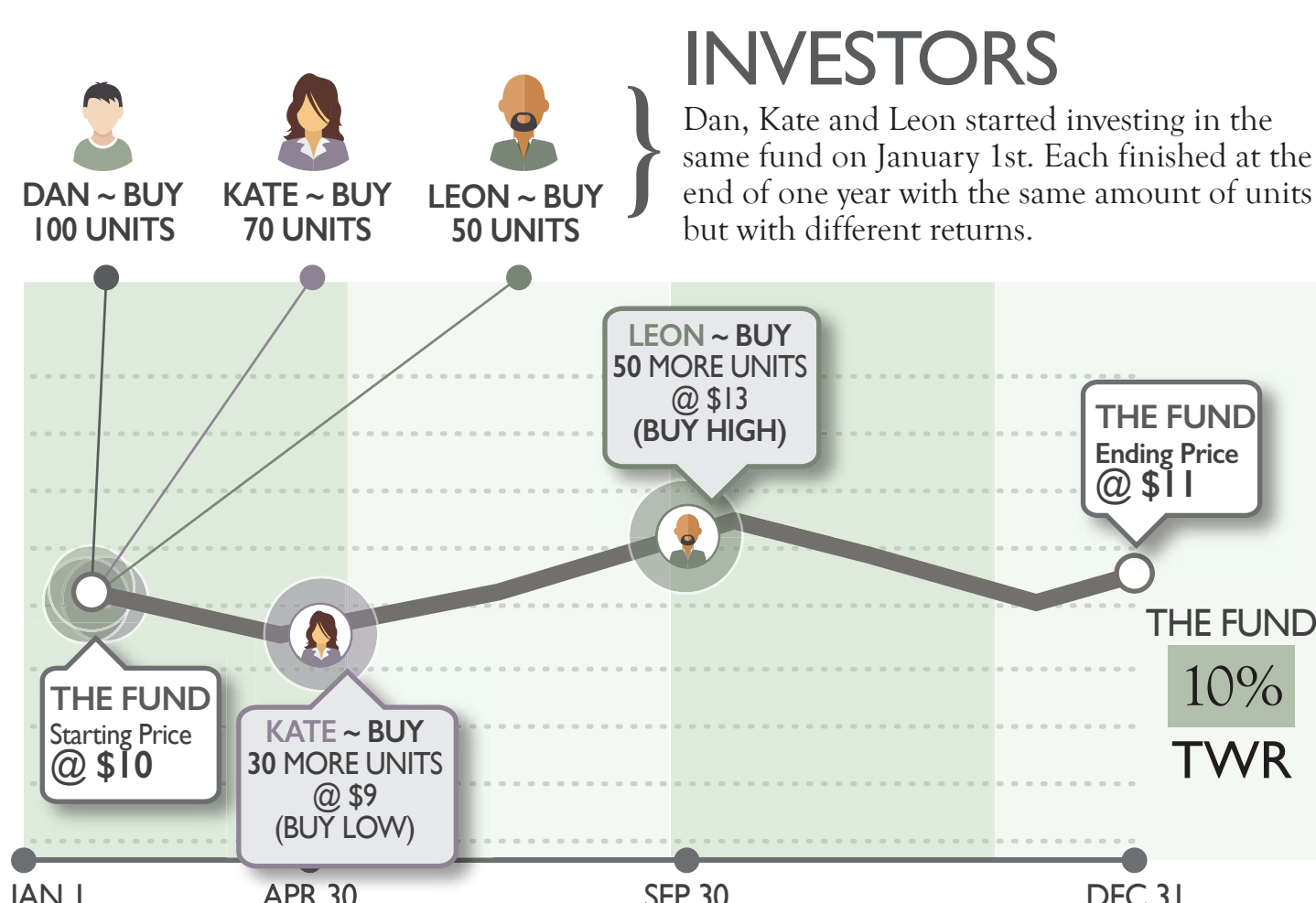
Money-Weighted Return (MWR)



The Annual Performance Report that you will receive for the period ending December 31, 2016 will reflect returns calculated using the money-weighted calculation method.

The Impact of Investor Behaviour

Investor behaviour can have a significant impact on Money-Weighted Returns



Contact your Advisor today

Learn more about your personal rate of return and how the timing and size of your investments contribute to your portfolio's overall performance.



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