



## KERRIMUIR GLOBAL TACTICAL INDEX

Kerrimuir Global Tactical Index is a globally diversified portfolio focusing on investing in market index ETFs. Equity research is provided by CPMS - Morningstar. Commodities are added to the portfolio to add a level of diversification and to offer a potential hedge against long term inflation. Alternatives are added to the portfolio to add another level of diversification and to provide potential defense against market uncertainty.

### Annualized Returns (as of March 31<sup>st</sup>, 2026)

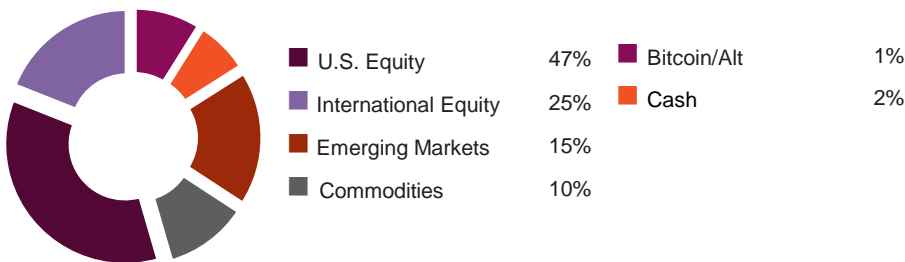
	YTD	1 Year	3 Year	5 Year	Since Inception
Kerrimuir Global Tactical Index	2.6%	22.4%	----	----	20.1%
Global Tactical Benchmark	0.1%	21.1%	----	----	19.7%

### Calendar Returns

	2024	2025	2026	2027	2028	2029
Kerrimuir Global Tactical Index	21.23%	19.58%	----	----	----	----
Global Tactical Benchmark	27.28%	20.67%	----	----	----	----

Benchmark: 30% TSX, 50% S&P 500, 20% MSCI EAFE, Source Morningstar Direct

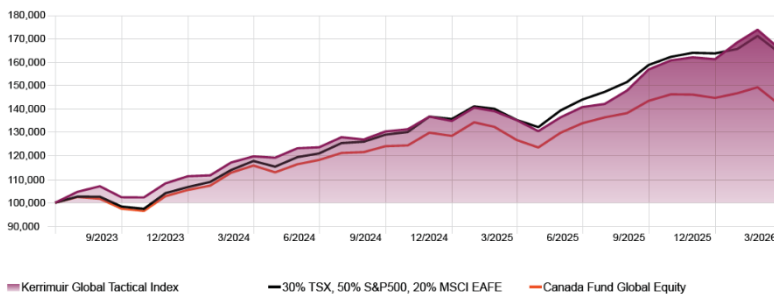
### Asset Allocation: (as of March 31<sup>st</sup>, 2026)



### Growth of \$100,000 since inception: (July 1<sup>st</sup>, 2023)

#### Growth of \$100,000 since inception

Time Period: Since Common Inception (7/1/2023) to 3/31/2026



# RICHARDSON Wealth

## Investment Objectives

The investment objective is long-term capital growth. The portfolio seeks to achieve this by investing directly in Market Index ETF's while managing for a potential higher level of risk & volatility. The asset allocation is regularly monitored for portfolio re-balancing opportunities.

## Portfolio Details

**Robert L. McDermott** CIM®

Senior Portfolio Manager, Investment Advisor

**Morningstar CPMS**

Equity Research

**Global Equity**

Asset Class

**Account Type**

Portfolio Managed Account

**July 1, 2023**

Inception

**Daily**

Valuation Frequency

**\$100,000**

Minimum Investment

