INVESTMENT SCORECARD

October 2026

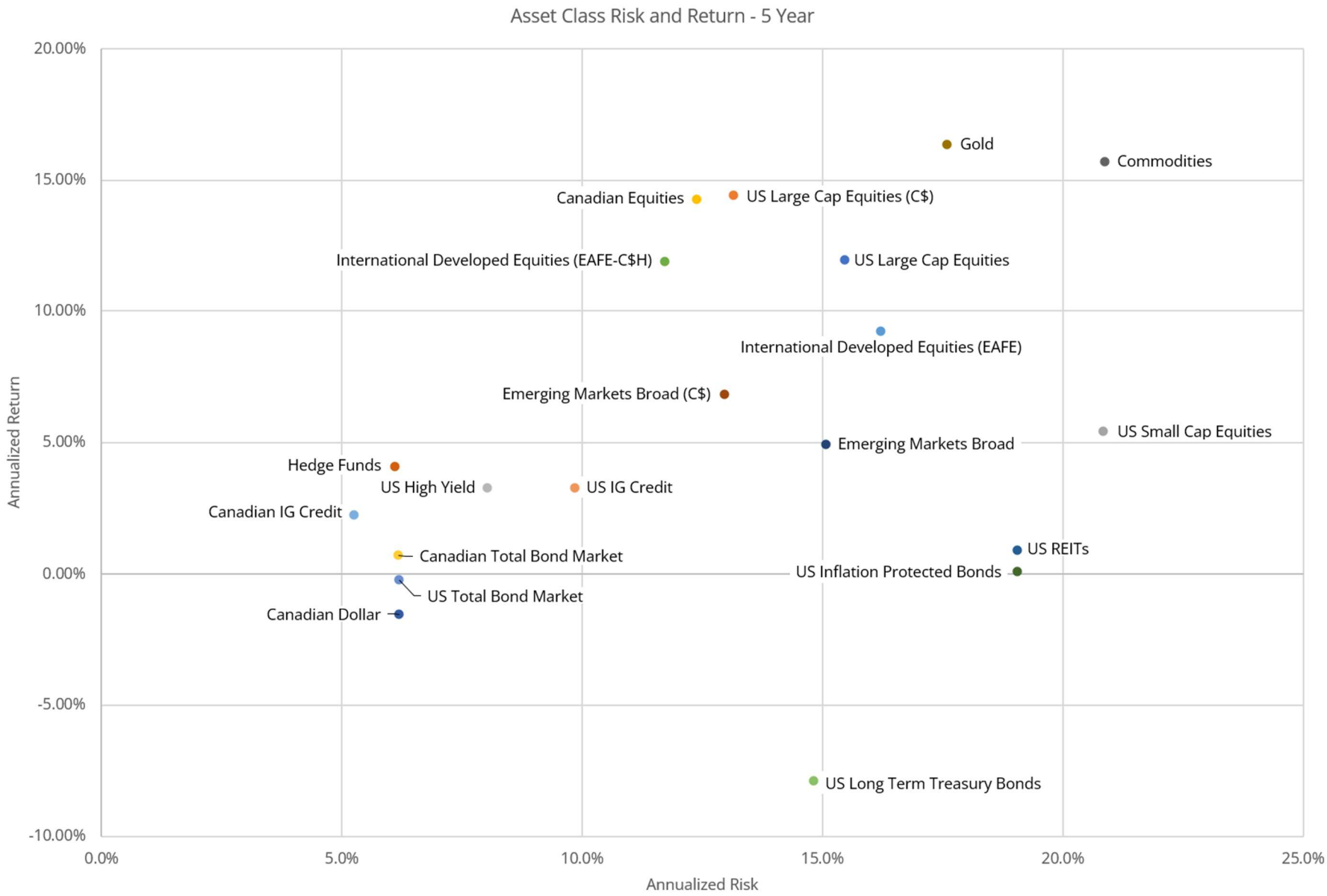
ASSET CLASS RETURNS

Asset Class	Ticker	1M	3M	12M	3Y	5Y	10Y
US Large Cap Equities	SPY	(0.91%)	1.41%	11.99%	23.28%	11.96%	15.33%
US Large Cap Equities (C$)	XUS.TO	(2.54%)	0.91%	11.42%	23.28%	14.43%	15.51%
US Small Cap Equities	IWM	0.52%	(3.83%)	14.60%	20.63%	5.43%	10.32%
Canadian Equities	XIC.TO	1.24%	1.63%	20.27%	26.85%	14.27%	12.41%
International Developed Equities (EAFE)	VEA	(1.66%)	(1.43%)	16.97%	21.61%	9.23%	9.83%
International Developed Equities (EAFE-C$H)	VI.TO	(2.30%)	(1.54%)	16.48%	19.59%	11.92%	10.89%
Emerging Markets Broad	VWO	(6.41%)	(5.34%)	3.29%	16.77%	4.92%	6.84%
Emerging Markets Broad (C$)	VEE.TO	(8.15%)	(5.75%)	2.32%	16.35%	6.84%	6.68%
Commodities	GSG	4.08%	15.54%	59.50%	19.62%	15.71%	9.78%
Gold	GLD	(6.58%)	(4.24%)	(3.35%)	24.56%	16.38%	11.30%
US REITs	VNQ	4.81%	(4.24%)	9.32%	13.16%	0.91%	5.52%
US Inflation Protected Bonds	TIP	2.55%	(0.15%)	(0.01%)	4.68%	0.10%	2.26%
US Total Bond Market	AGG	2.29%	0.01%	(0.23%)	5.31%	(0.23%)	1.41%
US IG Credit	LQD	2.49%	(0.60%)	(1.79%)	6.37%	(0.89%)	2.10%
US High Yield	JNK	0.83%	(1.17%)	1.97%	8.46%	3.27%	4.29%
Canadian Total Bond Market	XBB.TO	1.49%	(0.00%)	(0.41%)	5.06%	0.72%	1.43%
Canadian IG Credit	XCB.TO	1.04%	0.03%	0.55%	6.47%	2.26%	2.51%
US Long Term Treasury Bonds	TLT	5.64%	0.69%	(5.16%)	3.62%	(7.90%)	(1.84%)
Canadian Dollar	FXC	1.85%	0.30%	0.50%	0.64%	(1.54%)	0.08%
Hedge Funds	QAI	(1.55%)	(1.66%)	6.36%	8.91%	4.07%	3.69%

Source and Notes:
Return calculations performed by Anchor Pacific using FLARE™ by Anchor Pacific Financial Risk Labs Ltd. based on monthly values sourced from Yahoo Finance, QuoteMedia, and Fundata. All returns greater than one month assume reinvestment of dividends.
Risk measures the annualized standard deviation of monthly returns for 5 years based on the above data.
Returns are US$ for SPY, IWM, VEA, VWO, GSG, TIP, AGG, JNK, LQD, TLT, FXC, QAI, and VNQ. Returns are C$ for XUS.TO, XIC.TO, VI.TO, VEE.TO, XBB.TO, and XCB.TO. Please see disclaimer for further details.

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KEY INDEX LEVELS AND RATES

Index/Security	Oct 2026	1M Ago	3Ms Ago	6Ms Ago	12Ms Ago	1M Delta	3M Delta	6M Delta	12M Delta
S&P 500	7,580.07	7,651.54	7,489.72	7,209.01	6,840.20	(0.93%)	1.21%	5.15%	10.82%
S&P/TSX Composite	35,620.03	35,235.87	35,226.14	33,964.33	30,260.74	1.09%	1.12%	4.87%	17.71%
5Y US Gov Bond Yield	4.71	5.09	4.45	4.02	3.71	(38 bps)	26 bps	69 bps	100 bps
5Y Canadian Gov Bond Yield	3.52	3.70	3.28	3.19	2.70	(18 bps)	25 bps	33 bps	82 bps
10Y US Gov Bond Yield	4.94	5.29	4.75	4.40	4.11	(35 bps)	19 bps	54 bps	83 bps
10Y Canadian Gov Bond Yield	3.80	4.00	3.67	3.54	3.12	(20 bps)	13 bps	26 bps	68 bps
30Y US Gov Bond Yield	5.31	5.64	5.27	4.98	4.67	(33 bps)	4 bps	33 bps	64 bps
30Y Canadian Gov Bond Yield	4.12	4.30	4.05	3.93	3.58	(19 bps)	6 bps	19 bps	54 bps
US Bond Yield Curve (3m -10y)	0.78	1.09	0.92	0.72	0.22	(31 bps)	(14 bps)	6 bps	56 bps
US High Yield (Option Adjusted Spread)	3.44	3.12	2.85	2.83	2.94	32 bps	59 bps	61 bps	50 bps
USD/CAD	$1.40	$1.42	$1.40	$1.36	$1.40	(1.82%)	(0.33%)	2.88%	(0.27%)
USD/Euro	€ 0.90	€ 0.88	€ 0.87	€ 0.85	€ 0.87	1.52%	3.30%	5.13%	3.37%
USD/Yen	¥157.55	¥157.42	¥157.58	¥156.58	¥154.01	0.08%	(0.02%)	0.62%	2.30%
Gold	$3,898.90	$4,186.70	$4,107.00	$4,629.60	$4,015.90	(6.87%)	(5.07%)	(15.78%)	(2.91%)
Oil (WTI)	$104.12	$90.42	$84.67	$105.07	$60.98	15.15%	22.97%	(0.90%)	70.74%
CBOE Volatility Index (VIX)	19.42	16.34	15.99	16.89	17.44	18.85%	21.45%	14.98%	11.35%

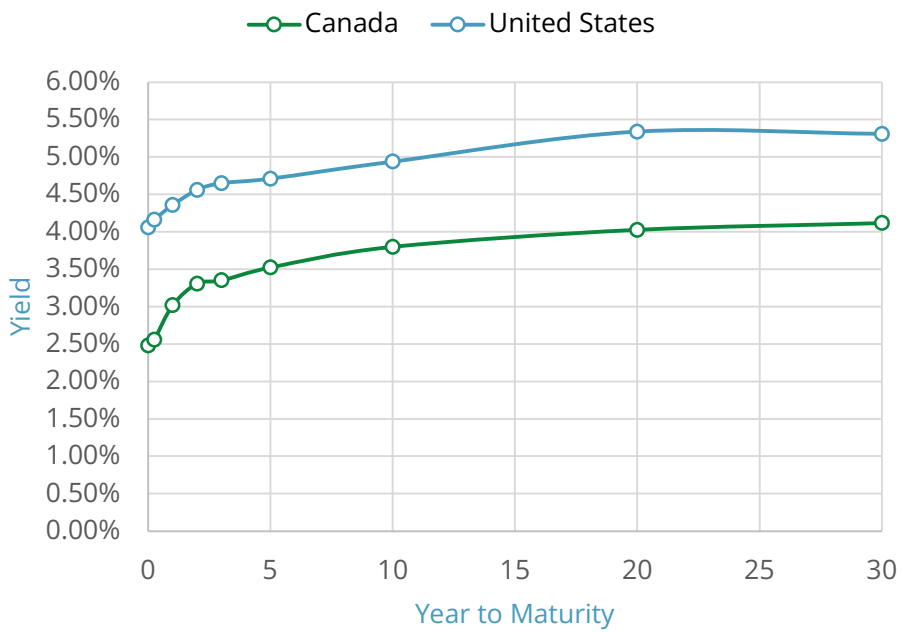
Source and Notes:
FLARE™ by Anchor Pacific Financial Risk Labs Ltd., Yahoo Finance, QuoteMedia, Fundata Canada Inc., investing.com, US Department of the Treasury (https://www.treasury.gov/resource-center/data-chart-center/interest-rates/), and Federal Reserve Bank of St. Louis Economic Research (FRED) (https://fred.stlouisfed.org/)
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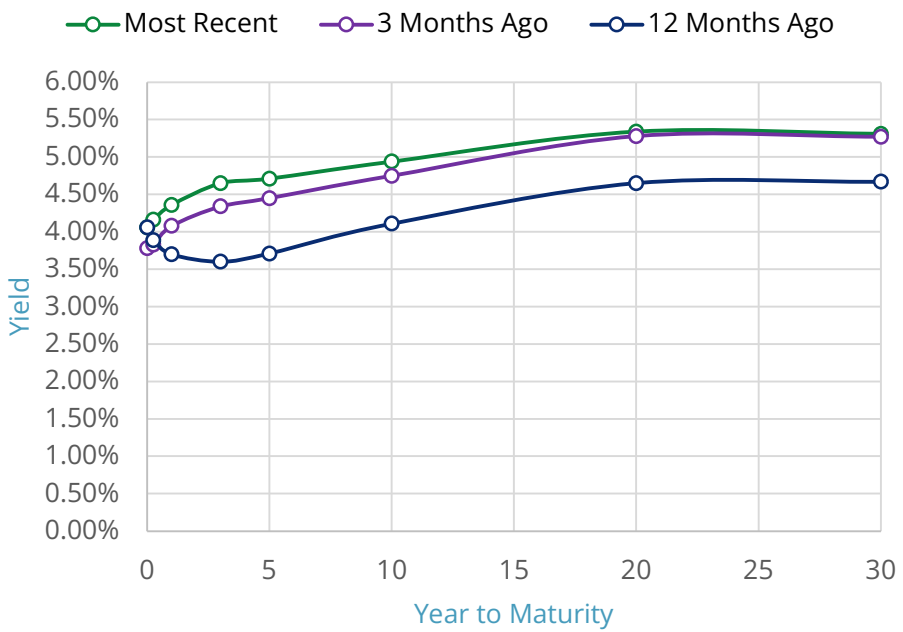
Government Bond Yield Curves

As of October 31, 2026



US Government Bond Yield Curves

Then and Now



Source and Notes:
Yield curves are calculated for Canada based on data provided by investing.com for 1 month, 3 months, 1 year, 3 years, 5 years, 10 years, 20 years, and 30 years.
Yield curves are calculated for the US based on data provided by the US Department of the Treasury's website (https://www.treasury.gov/resource-center/data-chart-center/interest-rates/) for 1 month, 3 months, 1 year, 3 years, 5 years, 10 years, 20 years, and 30 years.

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