

TheAnswersIs.ca Model Portfolio Performance Update (Q1 2018)

The Total Return for TheAnswersIs.ca model portfolio from inception on October 21, 2016 to March 31, 2018, was 14.39%.

The corresponding Total Return for the Toronto Stock Exchange (TSX), as represented by the ETF XIC, was 7.42%.

The Total Return of TheAnswersIs.ca model portfolio of 14.39% comprised a Capital Return (share price increases) of 10.47%, plus an Income Return (dividends) of 3.92%.

Past returns are not indicative of future returns.

TheAnswersIs.ca model portfolio comprises six Exchange Traded Funds or ETFs. Each ETF is designed to match an associated index, such as the Canadian Market (TSX) Index, US Market Index, Emerging Market Index, etc. These ETFs were carefully selected to provide global geographic, and more importantly economic sector diversification, at a low cost.

TheAnswersIs.ca portfolio is simply designed to match the performance of each of the six equity market indices, good or bad. To learn more about this model portfolio, go to www.theansweris.ca, and take the “Ready to Invest” quiz.

Since Oct 21, 2016, TheAnswersIs.ca model portfolio has had a higher Total Return than the TSX, due to the broader economic sector diversification in TheAnswersIs.ca portfolio compared to the TSX. The TSX is heavily weighted in finance, materials and oil & gas, and when these sectors rebound the TSX will perform comparatively well vs TheAnswersIs.ca model portfolio.

Where is the stock market going from here?

Global stock markets have experienced increased volatility lately, and this is likely to continue. Volatility in the up direction is fun, but volatility in the down direction can be scary. People invested in equities should be prepared to leave that money untouched for a minimum of 10 years, and preferably much longer! Prepare yourself for continued volatility by reviewing these two articles:

How does an investor survive a Bear attack? <https://theansweris.ca/Q22.php>

The Stock Markets are near all-time highs, should I invest my nest egg now?

<https://theansweris.ca/Q21.php>

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Be patient long-term investors!

Dave Jenkins, TheAnswerIs.ca Inc.

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