



FEBRUARY 2025 PERFORMANCE RESULTS

An overview of our three portfolios to date.

Performance to February 28, 2025	YTD	6 Mo	1 Yr	3 Yr**	5 Yr**	10 Yr**	Inception**
Hillside Conservative Growth*	3.92%	9.77%	16.71%	10.35%	8.86%	7.73%	8.33%
HCG Benchmark ¹	2.15%	5.36%	11.37%	4.43%	4.75%	4.27%	4.59%
Hillside Balanced Growth*	3.74%	10.15%	16.27%	11.96%	11.02%	9.33%	10.44%
HBG Benchmark ²	2.74%	9.02%	17.65%	8.69%	9.44%	6.91%	7.08%
Hillside Focused Growth*	3.69%	12.22%	19.38%	16.96%	16.77%	10.52%	11.60%
HFG Benchmark ³	3.20%	12.04%	22.57%	12.31%	13.85%	9.31%	9.36%

Past performance is not an indication of future returns.

* Performance is presented gross of fees.

**Inception: Sept 2, 2014. Results beyond 1 year are annualized.

¹ Hillside Conservative Growth Benchmark: 100% Vanguard Conservative ETF

² Hillside Balanced Growth Benchmark: 75% Vanguard Balanced ETF & 25% Vanguard All-Equity ETF

³ Hillside Focused Growth Benchmark: 100% Vanguard All-Equity ETF

Source: SIACHarts.com

This information has been prepared by Michael Preto and Jason Del Vicario who are Portfolio Managers for iA Private Wealth and does not necessarily reflect the opinion of iA Private Wealth. The information contained in this newsletter comes from sources we believe reliable, but we cannot guarantee its accuracy or reliability. The opinions expressed are based on an analysis and interpretation dating from the date of publication and are subject to change without notice. Furthermore, they do not constitute an offer or solicitation to buy or sell any of the securities mentioned. The information contained herein may not apply to all types of investors. The Portfolio Manager can open accounts only in the provinces in which they are registered.

iA Private Wealth is a trademark and business name under which iA Private Wealth Inc. operates. iA Private Wealth Inc. is a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada.

Insurance products provided through iA Private Wealth Insurance.

Hillside Wealth Management is a personal trade name of Michael Preto and Jason Del Vicario.

Performance is calculated using month-end market values of the model portfolio. Since we use a model portfolio to calculate performance there are no client-initiated cash flows (deposits/withdrawals) to account for.

Performance is calculated by dividing the change in the model portfolio's market value by the model portfolio's market value at the beginning of the performance period. Also, all income generated by the portfolio's holdings are held within the model portfolio in cash and is accounted for in the portfolio's month-end market value - this results in a total return measure of the model's performance.

Returns for periods less than 1 year are shown as periodic returns while returns for periods greater than 1 year are annualized. Returns do not include fees and actual returns experienced by an investor may differ from those shown. Past performance is not a guarantee of future results.

[Jump to: Previous Article](#) | [Full Newsletter](#)