

PORTFOLIO SUMMARY

May 2026



CrossPoint
FINANCIAL



An at-a-glance look at the CrossPoint Medium portfolio models, their asset mix, and historical performance

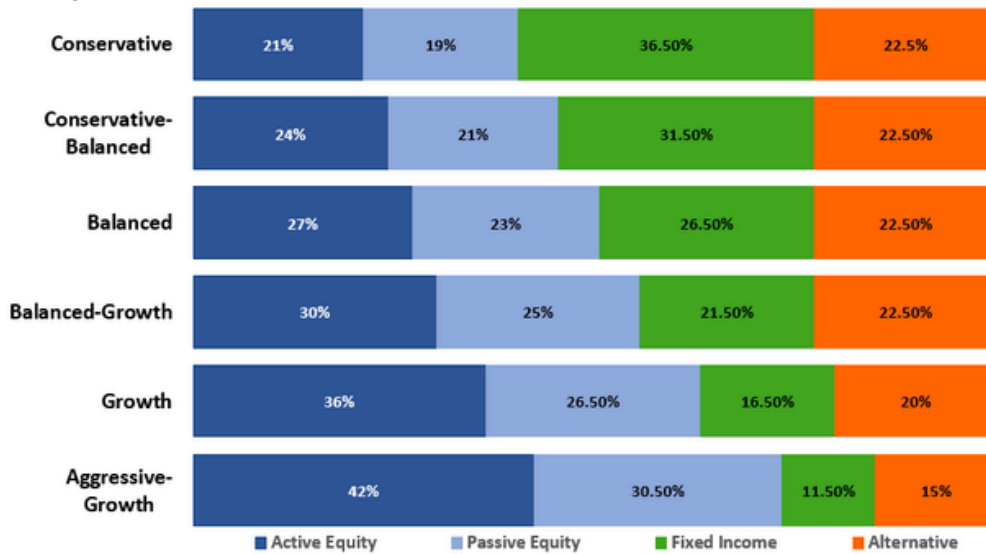
Portfolio Returns

Name	1-Mo	3-Mo	6-Mo	Annualized			YTD 2026	2025	2024	2023	2022	2021
				1-Yr	3-Yr	5-Yr						
CPF Conservative Portfolio	1.8%	0.8%	2.5%	10.2%	9.4%	6.4%	3.3%	9.4%	10.6%	8.4%	-5.7%	9.8%
CPF Conservative-Balanced Portfolio	1.9%	1.0%	2.7%	11.1%	10.0%	6.8%	3.6%	10.0%	11.4%	8.8%	-6.1%	11.0%
CPF Balanced Portfolio	2.1%	1.2%	2.9%	11.9%	10.7%	7.2%	3.8%	10.6%	12.1%	9.1%	-6.4%	12.3%
CPF Balanced-Growth Portfolio	2.2%	1.4%	3.2%	12.7%	11.3%	7.6%	4.1%	11.3%	12.9%	9.5%	-6.8%	13.5%
CPF Growth Portfolio	2.6%	1.8%	3.6%	14.3%	12.6%	8.2%	4.6%	12.5%	14.4%	10.4%	-8.3%	15.5%
CPF Aggressive-Growth Portfolio	2.9%	2.1%	4.0%	15.9%	13.8%	8.7%	5.0%	13.6%	15.7%	11.2%	-9.8%	17.5%

All returns gross of advisor fees. Model returns from CrossPoint Medium Portfolios. Performance data tracked in YCharts

Asset Mix & Annual Return Range

Target Asset Allocation



Choosing the Right Mix

Aggressive-Growth

Maximum Growth potential, with a strong emphasis on equities and a fixed income component for stability.

Growth

Higher Growth potential through Canadian and foreign equities; fixed income is used to reduce volatility.

Balanced-Growth

Broader equity exposure to capture more market upside; long-term performance is mostly driven by equities.

Balanced

A middle-ground mix for investors seeking higher long-term returns while remaining fairly risk-averse.

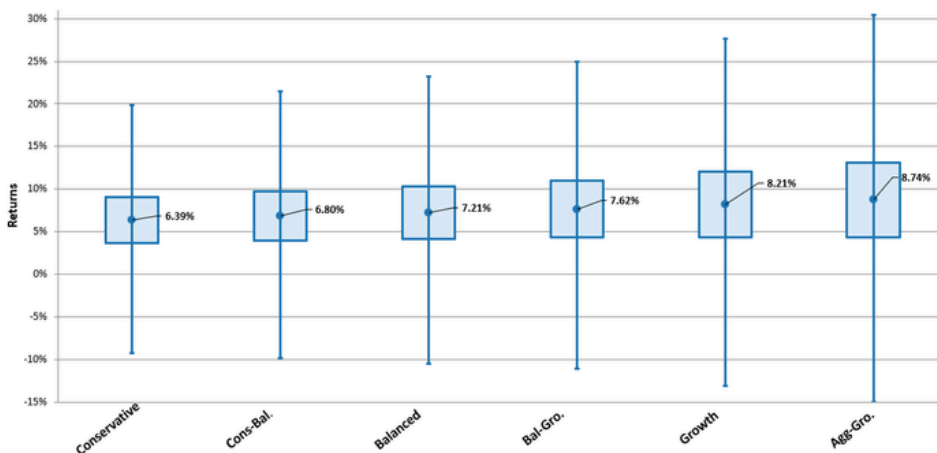
Conservative-Balanced

Heavier bias to fixed income. Aims for downside protection with some room for capital appreciation

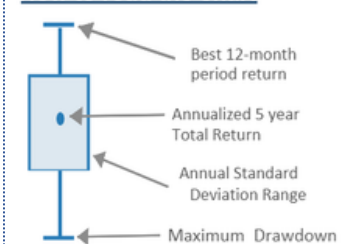
Conservative

Designed for investors looking to limit downside while keeping some long-term growth potential.

Annual Return Range



How to read the chart



- Boxes represent a typical range around an illustrative expected return.
- Whiskers represent a wider range of potential outcomes (upside and downside).
- Growth-oriented portfolios generally have wider ranges of outcomes.

Questions about which portfolio is the right fit? Reach out to your CrossPoint advisor and we'll walk you through the trade-offs based on your goals, time horizon, and comfort with risk.