

Understanding Your Investment Performance

There are different ways to measure returns for assets. Understand which method is being used when reviewing your investment performance.

YOUR RATE OF RETURN

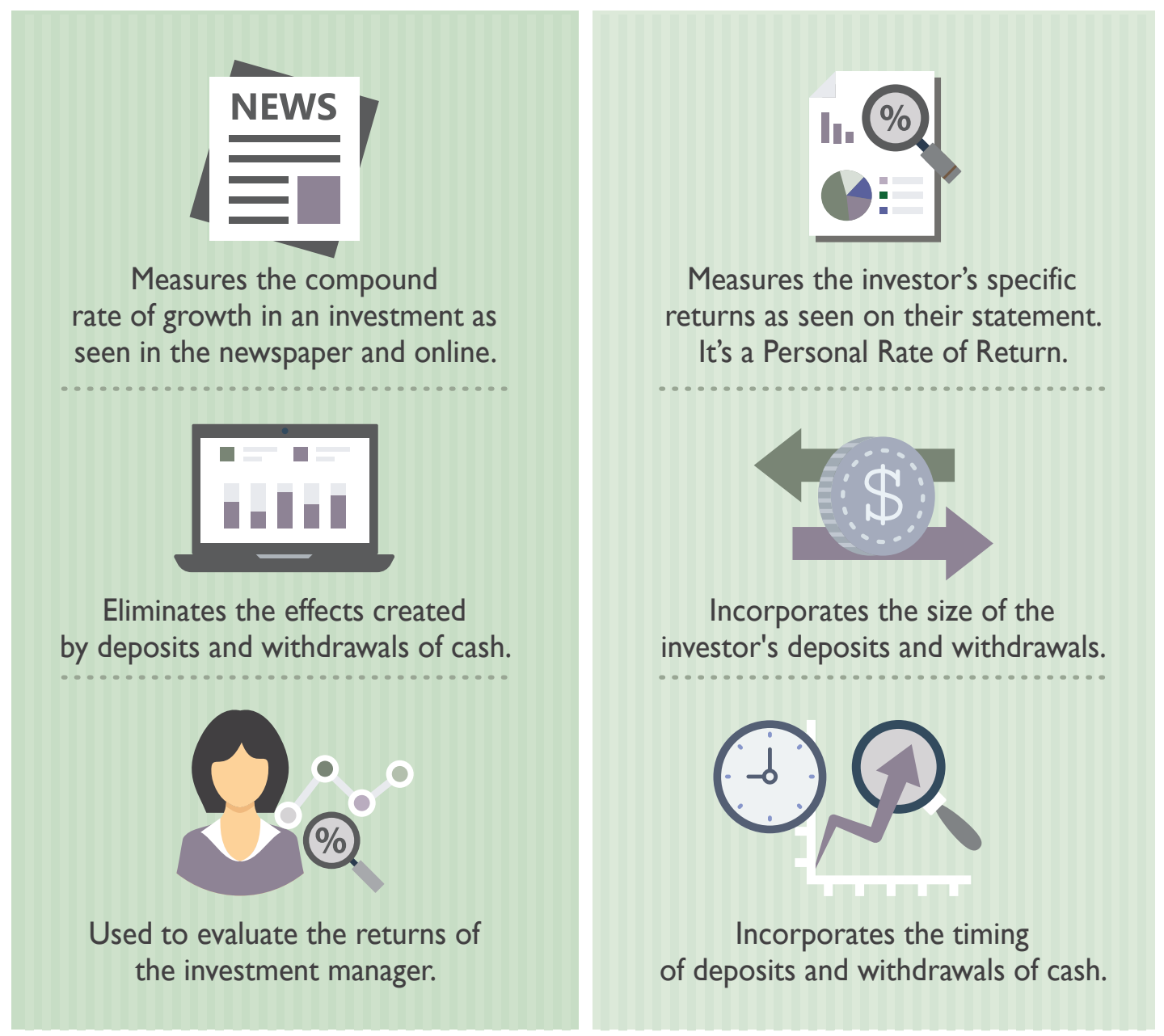


REVIEWING YOUR RETURNS

There are a number of ways to calculate an investment rate of return. Time-Weighted and Money-Weighted are two calculation methods that investors see when looking at their asset performance.

Time-Weighted Return (TWR)

Money-Weighted Return (MWR)

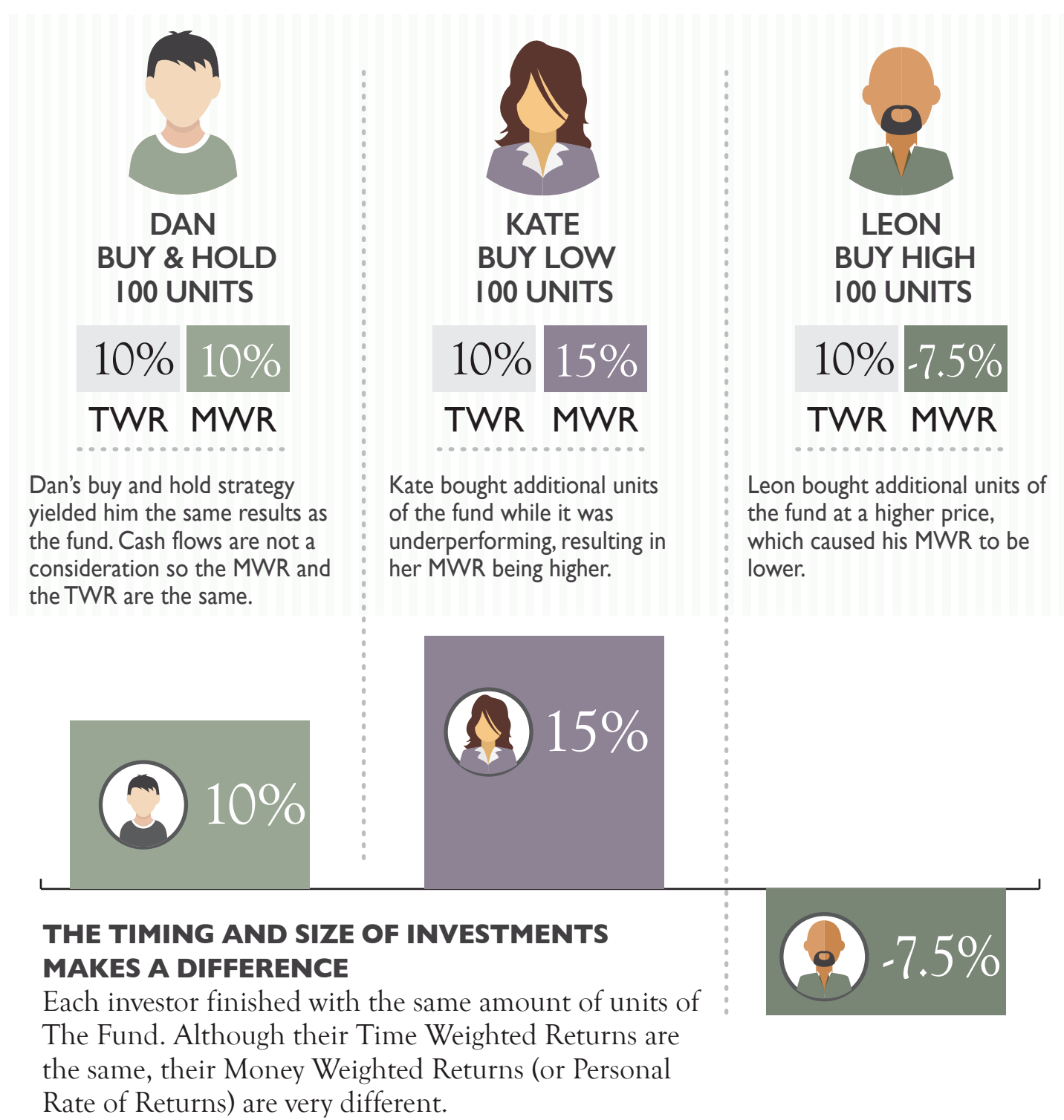
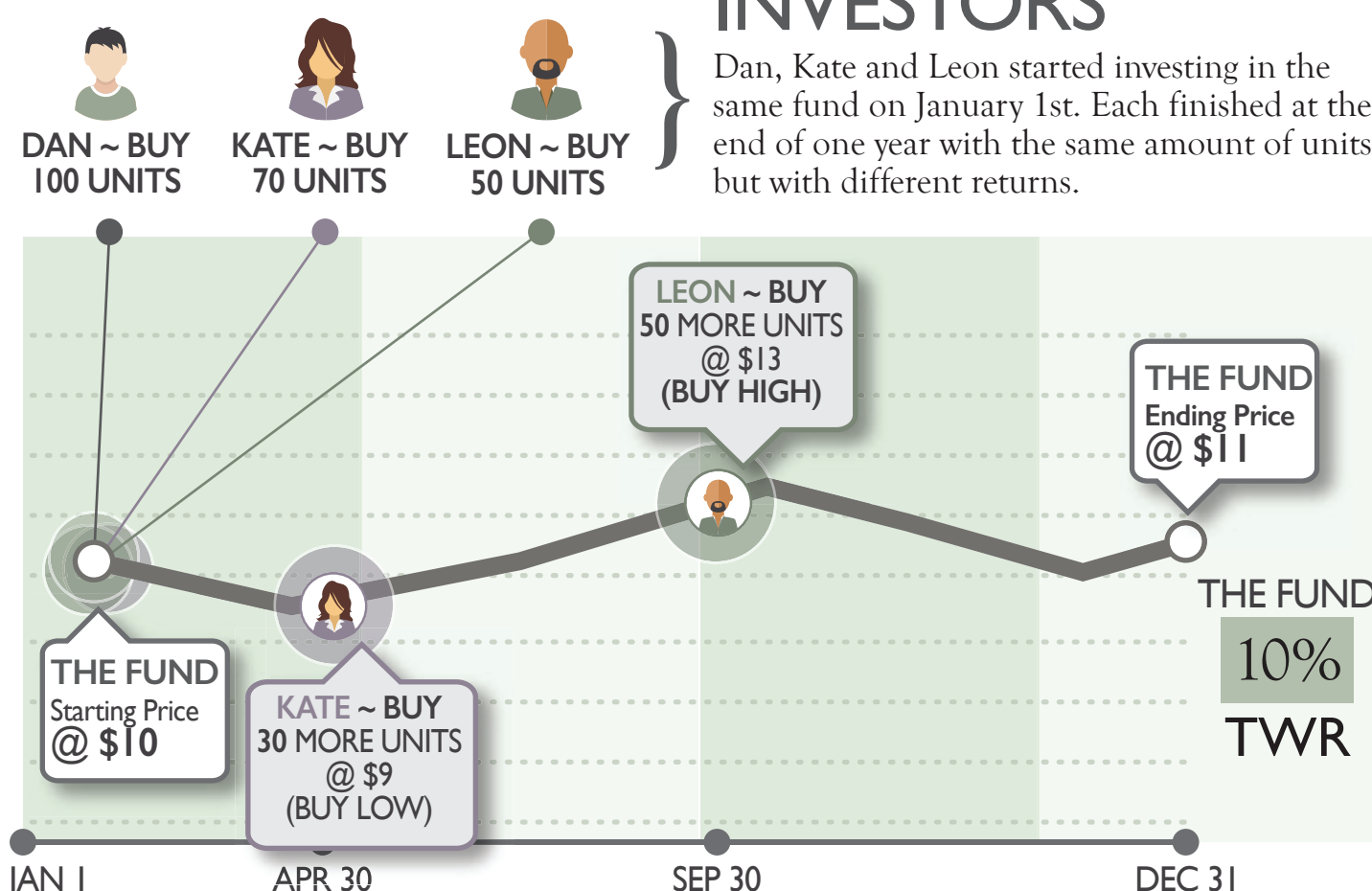


The Impact of Investor Behaviour

Investor behaviour can have a significant impact on Money-Weighted Returns

INVESTORS

Dan, Kate and Leon started investing in the same fund on January 1st. Each finished at the end of one year with the same amount of units but with different returns.



Contact us today.

Learn more about your personal rate of return and how the timing and size of your investments contribute to your portfolio's overall performance.



Investment
Planning Counsel®

FINANCIAL SOLUTIONS FOR LIFE

Trademarks owned by Investment Planning Counsel Inc. and licensed to its subsidiary corporations. Investment Planning Counsel is a fully integrated Wealth Management Company. Mutual Funds available through IPC Investment Corporation and IPC Securities Corporation. Securities available through IPC Securities Corporation, a member of the Canadian Investor Protection Fund. Insurance products available through IPC Estate Services Inc.

Mortgage Broker Services provided by Invis Inc. (Lic# ON 10801 / SK 315928) or Mortgage Intelligence Inc. (Lic# ON 10428 / SK 315857). © Copyright 2016 Ativa Interactive. All Rights Reserved.