

NEW ON THE STEADYHAND SHELF

One ticket. Three portfolios. Actively managed for you.

The Active Suite is a new lineup of three ready-made portfolios, available on the Steadyhand shelf. Each one already holds a mix of bonds and stocks, adjusted over time by an experienced team, so you simply choose the one portfolio that fits how much risk you're comfortable with.

BEFORE WE GO FURTHER

Here's what matters most

A few quick answers, first.

01

Your Steadyhand funds aren't changing

The Active Suite is being **added** to the shelf, not replacing anything on it. Every fund you already hold stays exactly as it is; no action needed on your part. Your existing Steadyhand funds remain unchanged.

02

One process, three ways to fit

Conservative, Balanced and Growth are the same investment process, dialled to three different mixes of bonds and stocks, so it's easy to find the one that fits how you invest.

03

Backed by an experienced investment team

Led by **Craig Basinger, CFA** (Chief Market Strategist, Purpose Investments, with 25+ years experience) and **Derek Benedet, CMT**, whose process has been running since 2015. All three funds currently rank in the **top decile** of their Morningstar category over the past 2 years.

04

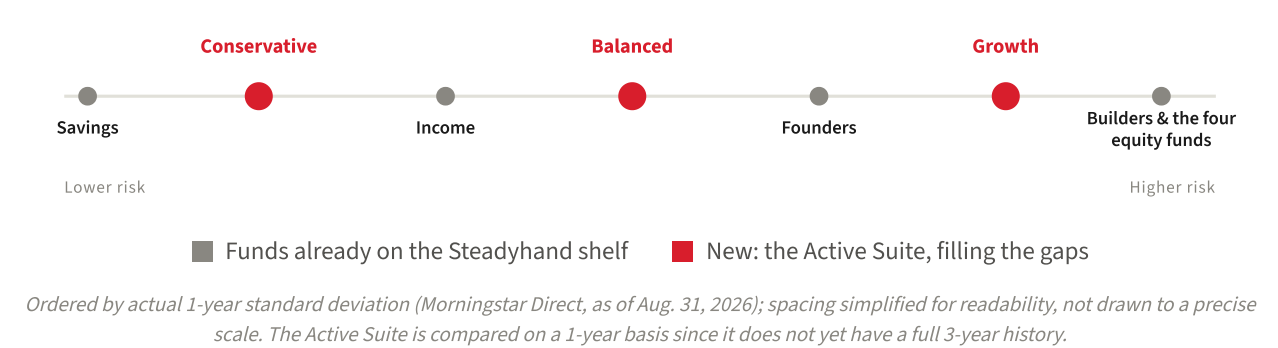
Actively adjusted with the market

Craig and the team continuously reassess their view on markets and shift the portfolio's mix accordingly, for example leaning into emerging markets or gold when their outlook calls for it, rather than sitting still like a fixed-weight ETF.

ONE-TICKET SOLUTION

Funds for everyone. Find your fit.

We care about fit. The Active Suite adds three new single-ticket options to the Steadyhand shelf, each one filling a gap between funds you already know, so it's easier to match a portfolio to exactly how much risk you're comfortable with, all in one ticket.



THE THREE PORTFOLIOS

Same process, three ways to fit

The only thing that changes between them is how much is invested in bonds and stocks, so you can find the mix that fits. Picking investments can feel complicated. We simplified it to three fits.

STEADYHAND CLASS

Purpose Active Conservative Fund

Fund code: SIF22007

Leans mostly on bonds, with a smaller portion in stocks, for those who want steady, lower-swing growth.

Bonds ~60%

Equity ~40%

INCOME

GROWTH

GOOD FIT FOR:

- Income and stability first

- A lower-risk core holding

- A shorter time horizon or lower risk tolerance

MANAGEMENT FEE 1.34%

STEADYHAND CLASS

Purpose Active Balanced Fund

Fund code: SIF22107

An even mix of bonds and stocks: the core, all-in-one holding for steady, moderate growth.

Bonds ~40%

Equity ~60%

INCOME

GROWTH

GOOD FIT FOR:

- A single core long-term holding

- A moderate risk profile

- Steady, balanced growth objectives

MANAGEMENT FEE 1.34%

STEADYHAND CLASS

Purpose Active Growth Fund

Fund code: SIF22207

Leans mostly on stocks, for a long time horizon and comfort riding out more ups and downs.

Bonds ~20%

Equity ~80%

INCOME

GROWTH

GOOD FIT FOR:

- Long-term wealth building

- A longer time horizon

- A higher tolerance for market fluctuations

MANAGEMENT FEE 1.34%

Combining active management with low-cost building blocks.

About half of each portfolio is actively managed; the rest sticks to simple, low-cost building blocks. This blend is designed to give you active management without an all-active price tag. One fit, one simple fee.

PERFORMANCE

How the Active Suite has performed

How the Active Suite compares within its Morningstar categories

Conservative (PACF)	Balanced (PABF)	Growth (PAGF)
Inception: Oct. 23, 2023	Inception: Oct. 23, 2023	Inception: Oct. 24, 2023
YTD Top 7% 6.53%	YTD Top 7% 10.49%	YTD Top 8% 13.60%
1 YR Top 6% 10.86%	1 YR Top 9% 15.83%	1 YR Top 7% 20.70%
2 YR Top 4% 10.51%	2 YR Top 8% 14.20%	2 YR Top 9% 18.24%

Since inception return (annualized): Conservative 13.06% · Balanced 16.43% · Growth 20.31%

Percentile rank of the ETF series (TSX: PACF/PABF/PAGF) within each fund's own Morningstar category, as of Aug. 31, 2026. Number of funds ranked in category by period — Conservative (Canada ETF Global Fixed Income Balanced): 861 YTD, 853 1 Yr, 829 2 Yr; Balanced (Canada ETF Global Neutral Balanced): 1,604 YTD, 1,581 1 Yr, 1,519 2 Yr; Growth (Canada ETF Global Equity Balanced): 1,133 YTD, 1,112 1 Yr, 1,074 2 Yr. 1 is the best possible rank. The smaller figure beside each rank is that period's total return. Rankings are subject to change monthly. Source: Morningstar Direct, as of Aug. 31, 2026. Steadyhand Class launched Oct. 5, 2026 and has no performance or ranking history of its own; ranks and returns shown are for the ETF series, not Steadyhand Class.

STEADYHAND CLASS LAUNCH	STRATEGY LIVE SINCE	MANAGEMENT FEE	EXCHANGE (ETF)
Oct. 5, 2026	Oct. 2023	1.34%	Toronto Stock Exchange

PERFORMANCE & RANKS SHOWN

ETF series, not Steadyhand Class

Commissions, trailing commissions, management fees and expenses all may be associated with investment fund investments. Please read the prospectus before investing. If units are purchased or sold on a stock exchange, you may pay more or receive less than the current net asset value. Investment funds are not guaranteed, their values change frequently, and past performance may not be repeated. The indicated rates of return are the historical annual compounded total returns including changes in unit value and reinvestment of distributions and do not take into account sales, redemption, distribution or optional charges or income taxes payable by any unitholder that would have reduced returns. Performance shown is that of the fund's ETF series (TSX: PACF/PABF/PAGF), it is not the performance of Steadyhand Class, which is a different series with no performance history of its own as of the date of this document. Actual returns to an investor in the Steadyhand Class, net of the fund's expense ratio, will be lower than that of the ETF series.

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