



Enriched Investing Incorporated marks 6-year anniversary of the Enriched Capital Conservative Growth Strategy with strong performance

February 14, 2024 (TORONTO) - Enriched Investing Incorporated (‘Enriched Investing™’) today announced that the Enriched Capital Conservative Growth Strategy (‘ECCG Strategy’) is marking its 6-year anniversary with continued strong performance.

With above average growth, below average valuation, and lower volatility the ECCG Strategy significantly outperformed the S&P/TSX Total Return Index (S&P/TSX TRI) over the past 1-, 3-, and 6-year periods ended January 31, 2024.

	ECCG Strategy Return	S&P/TSX TRI Return	ECCG Strategy Out-Performance
1 year	1.96%	1.22%	73 bps
3 years	10.27%	7.20%	306 bps
6 years	5.98%	5.29%	69 bps

The ECCG Strategy, managed by Margaret Samuel, President, CEO and Portfolio Manager, uses fundamental and technical factors.

The ECCG Strategy is a conservative total return strategy that selects dividend paying stocks monthly targeting creation of a portfolio with above average growth and lower volatility to help investors sleep well at night.

“We are very pleased with the results,” said Margaret Samuel, President, CEO and Portfolio Manager at Enriched Investing™. “We maintain a consistent, disciplined approach, which is the foundation for the continued success of the ECCG Strategy,” she added.

Risk Analysis:

S&P/TSX TRI	Compared to S&P/TSX TRI	ECCG Strategy
Sharpe Ratio (4%) 0.28	41% better	0.40
Maximum Drawdown: 12 month -22.75%	30% better	-19.46%
Annualized Standard Deviation 15.13%	18% better	12.44%
Sortino Ratio 0.34	23% better	0.43



About Enriched Investing™

Founded in 1989, Enriched Investing Incorporated is a well-respected discretionary portfolio management firm in Ontario and British Columbia. Owned and managed by industry veterans, their expertise centers around building low volatility investment portfolios designed to grow capital and provide a dependable, growing stream of income for pension, trust, endowment funds and high net worth individuals.

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