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Project: Newport Private Wealth – New Website**

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| **Client: Newport Private Wealth** | **Created By: Elan** | |
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| **Requested By: Elizabeth** | **Date: February 20, 2025** | **Version: Investment Management** |

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| ***Section Type:*** | **Section Title: What We Do – Investment Management** |
| Meta | Tag  Newport Private Wealth: What We Do - Investment Management  Description  Our investment approach is purpose-built to protect and grow capital in a more stable fashion than retail investment portfolios. |
| Header | What We Do: Investment Management |
| Intro Blurb | [Overarching idea that is the result of other elements of investment management]  **The Newport Investment Management Approach**  Newport aims for stable capital growth with reduced risk and volatility compared to the typical retail investor portfolios. Our clients want to protect their wealth, generate income to fund their lifestyle, ensure long-term growth, and entrust asset management to experienced professionals. Top of Form |
| Module 1 | **Dynamic Diversification**  For many investors, diversification typically involves holding a mix of traditional securities like stocks, bonds, ETFs and mutual funds to spread risk and boost returns. This asset mix follows a '60/40' model. At Newport, we take a unique approach.  [Slider and animation of the below chart]  **A diagram of a financial chart  Description automatically generated with medium confidence**  **[https://newportprivatewealth.ca/what-we-do/investment-management/**  **Under “Dynamic Differentiation”**]  Our investment universe spans various asset categories, and our dynamic asset allocation involves reallocating capital based on market conditions. Unlike traders, our moves are deliberate and incremental, yet impactful over time. |
| Module 2 | **Independent Thinking**  Our Investment Committee—13 seasoned professionals with an average of 27 years of experience—brings diverse perspectives to every decision. With an open-architecture platform, we embrace opportunities in often-overlooked sectors while stepping away from overvalued areas. We value diverse opinions, fostering creativity and rigorous debates to ensure only the best ideas shape our investment decisions.  [ Chart showing how the IC works within the Newport framework]  Bottom of Form  ~~Bottom of Form~~  **Bottom of Form** |
| Testimonial | **What Our Clients Say**  [Video of Client Testimonial] |
| Module 3 | **Accessing Global Expertise**  Relationships matter. Newport partners with top institutional managers worldwide, leveraging our track record and industry reputation to access premium opportunities. This allows us to participate in investment ideas that are not typically available to most firms or individuals. With $6 billion in entrusted capital, our scale unlocks opportunities reserved for larger institutions while capturing smaller under-the-radar investments opportunities to have meaningful impact on returns. |
| Module 4 | **We Invest Alongside Our Clients**  We established Newport as a platform for investing our own capital and welcomed clients to join us. Our investment strategy emphasizes alignment and minimizes conflicts of interest. We hold third-party specialists to the same standard, choosing those who share our values and investment philosophy. We've declined opportunities where alignment was lacking, prioritizing this fundamental but often overlooked principle. When specialists fall short of expected risk-adjusted returns, our independence ensures we can make objective, proactive changes. |
| Module 5 | **Is Newport Right For You?**  Newport is designed to help affluent Canadians optimize their wealth with purpose and precision. Our services typically serve individuals with $1 million or more in investable assets. If our approach resonates with your goals, we invite you to connect with us.  Contact Us [Button]  We also offer tailored services for individuals and families with $300,000 or more to invest through Lonsdale Portfolios, a division of Newport Private Wealth. Learn more about Lonsdale Portfolios. [Link to Working with Newport]**Top of Form**  Lonsdale [Logo] |