

# TOP 5 REASONS to invest in MERIT's Global Blue Chip Dividend Strategy



## # 1 GO GLOBAL TO INCREASE INTERNATIONAL EXPOSURE

- MERIT's GBCD strategy invests from an extensive global investment universe
- Investing in global market leaders across regions increases diversification
- A global view expands the universe of companies trading at attractive valuations



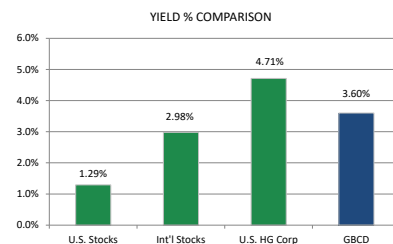
## # 2 INVEST IN HIGH QUALITY COMPANIES TO LOWER RISK

- MERIT's GBCD strategy invests in global market leading companies
- Broad sector & geographic diversification significantly improves risk metrics
- Lower drawdowns in market downturns leads to better long term performance



## # 3 GENERATE DIVIDEND INCOME TO INCREASE TOTAL RETURN <sup>1</sup>

- MERIT's GBCD strategy has a higher yield than stock and corporate bond indexes
- Higher yields available in international markets increases dividend income
- Higher dividend income improves total returns; notably in low growth periods



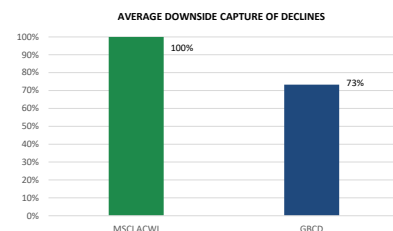
## # 4 EMPLOY A CONTINUOUS CYCLE OF INVESTMENT

- MERIT's GBCD strategy provides a continual schedule of dividend income
- Dividend income is allocated to attractive existing or new portfolio positions
- A continuous cycle of reinvestment & efficient capital allocation drives returns

2024 MAY						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		SKM 6.5%	DUK 4.2%	IBM 3.6%		
		ENB 6.3%				
					BIPC 5.1%	

## # 5 SEEK THE HIGHEST RISK-ADJUSTED RETURNS IN EQUITY MARKETS <sup>2</sup>

- High quality portfolio and dividend yield reduces losses in turbulent markets
- Lower drawdowns enable a quicker portfolio rebound back to breakeven
- Positive returns compound to deliver higher returns over a full market cycle



<sup>1</sup> Index Yields: U.S. Stocks = MSCI USA Index (USA). Int'l stocks = MSCI All-Country World Index ex US (ACWX). U.S. HG Corp = iShares iBoxx \$ Investment Grade Corp Bond ETF (LQD).

<sup>2</sup> GBCD Outperformance chart displays illustrative historical MERIT GBCD performance of an equally weighted portfolio of current MERIT GBCD positions as of September 30, 2024.

Note: Performance data shown represents past performance and is no guarantee of future results. Investors should consider a strategy's investment goals, risks, charges, and expenses before investing. It should not be assumed that future investments will be profitable or will equal the historical performance of the strategy.