



Home sweet home?

Buying a home has traditionally played a major role in financial planning, and residential real estate has long been viewed as a dependable, long-term investment vehicle. While real estate certainly has a place in a well-diversified stable of assets, the table below demonstrates that an investment made in Trimark Fund or Trimark Canadian Fund in September 1981, when they were launched, would have dramatically outperformed real estate.

Regional real estate growth versus Trimark Fund and Trimark Canadian Fund (since 1981)

City	Starting investment	Inflation-matched investment ¹	House value ²	Trimark Fund, Series SC ³	Trimark Canadian Fund, Series SC ³
	Sept. 30, 1981	Dec. 31, 2014	Dec. 31, 2014	Dec. 31, 2014	Dec. 31, 2014
Victoria	\$185,000	\$454,286	\$571,200	\$7,440,867	\$3,998,498
West Vancouver	\$339,000	\$832,448	\$1,950,000	\$13,634,885	\$7,326,977
Edmonton (Riverbend/Terwillegar)	\$170,000	\$417,452	\$560,354	\$6,837,553	\$3,674,295
Calgary (South West)	\$220,000	\$540,232	\$541,300	\$8,848,598	\$4,754,970
Regina (North)	\$129,000	\$316,772	\$505,000	\$5,188,496	\$2,788,142
Winnipeg (Charleswood)	\$115,000	\$282,394	\$480,750	\$4,625,404	\$2,485,553
London	\$96,000	\$235,738	\$342,800	\$3,861,206	\$2,074,896
Toronto (North)	\$235,000	\$577,066	\$1,710,625	\$9,451,912	\$5,079,173
Montreal (Beaconsfield)	\$126,900	\$311,616	\$545,625	\$5,104,032	\$2,742,753
Fredericton	\$95,000	\$233,282	\$295,000	\$3,820,986	\$2,053,283

Note: The values for inflation-matched investment, Trimark Fund and Trimark Canadian Fund assume that the starting investment was made on September 30, 1981.

¹ Inflation source: Consumer Price Index (CPI). CPI is an index representing the rate of inflation of Canadian consumer prices as determined by Statistics Canada. It was used to calculate the inflation-matched investment, which shows the value to which an investor's starting investment would have to grow simply to maintain purchasing power (keep pace with inflation).

² Comprised from the Royal LePage survey of Canadian House Prices on the average price of an executive detached two-storey home. For primary homes, factors such as municipal taxes, maintenance, costs, savings on rent and no capital gains tax on disposition are not accounted for. For investment purposes, rental income that the owner may gain during the holding period is not accounted for.

³ Inception date: September 1, 1981.



Standard performance (as at December 31, 2015)

	1-yr	3-yr	5-yr	10-yr	20-yr	30-yr	Since inception
Trimark Fund, Series SC	19.17%	19.61%	14.61%	6.49%	7.47%	9.92%	11.85%
Trimark Canadian Fund, Series SC	-19.00%	-0.99%	0.13%	1.37%	4.97%	6.90%	8.47%

For more information about this topic, contact your advisor, call us at 1.800.874.6275 or visit our website at www.invesco.ca/trimark.

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