



# TD ETF Portfolios: Simplify Your Portfolio

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The TD ETF Portfolios are all-in-one solutions that help make investing easy. Designed for investors who are looking for a low-cost and efficient way to invest.

**TCON**

**TBAL**

**TGRO**



# At TD Asset Management Inc. (TDAM), we have solutions for the every day investor.

**Our TD ETF Portfolios** are Exchange-Traded Funds (ETFs) of ETFs that offer a convenient way to diversify your portfolio, even if you only have a small amount of cash to invest.

## Why Invest with TD ETF Portfolios?



### Convenience

TD ETF Portfolios are a simple and efficient way to build a diversified portfolio, saving you time and money compared to building a portfolio on your own



### Choice

With three distinctive options, choose a portfolio that matches your risk tolerance, time horizon and return objectives



### Low-cost

Each TD ETF Portfolio offers exposure to a diversified basket of stocks and bonds, by investing in various broad-market index ETFs globally, and is rebalanced quarterly — all at a low management fee of 0.15%.

**Supported by TDAM and its 30 years** of experience managing money.

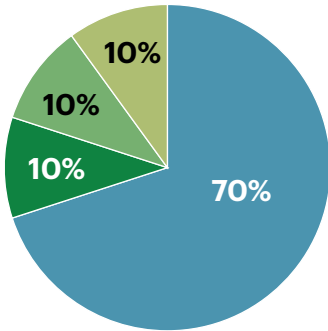
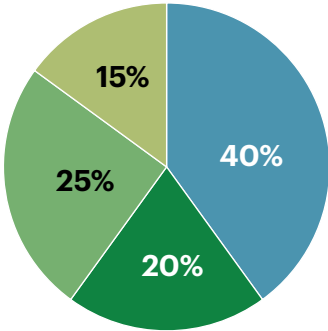
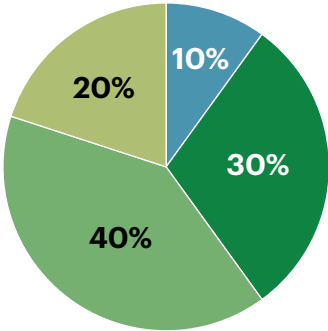
# \$437 Billion

in assets under management<sup>1</sup>

<sup>1</sup> Asset management businesses at TD manage \$437 billion in assets. Aggregate statistics are as of December 31, 2023 for TDAM and Epoch Investment Partners, Inc. TDAM operates in Canada and Epoch Investment Partners, Inc. operates in the United States. Both entities are affiliates and are wholly-owned subsidiaries of The Toronto-Dominion Bank.

# Solutions at a Glance

## TD ETF Portfolios

Ticker Symbol	TCON	TBAL	TGRO
ETF Name	TD Conservative ETF Portfolio	TD Balanced ETF Portfolio	TD Growth ETF Portfolio
Management Fee	0.15%	0.15%	0.15%
Style	Asset Allocation	Asset Allocation	Asset Allocation
Overview	Designed to earn a moderate level of income and preserve investment capital, with the potential for capital growth	Focused on generating long-term capital growth, while providing the opportunity to earn some income	Created to generate long-term capital growth, with the added potential for earning a modest level of income
Benchmark Asset mix	 <ul style="list-style-type: none"> <li>● Fixed Income</li> <li>● Canadian Equity</li> <li>● U.S. Equity</li> <li>● International Equity</li> </ul>		
Risk Rating	Low-Medium	Low-Medium	Low-Medium
Suitable For	Medium-term goal (e.g., saving for a large purchase, education)	Medium to long-term goal (e.g., saving for a large purchase, education, retirement)	Medium to long-term goal (e.g., saving for retirement)
Distribution Frequency	Monthly	Monthly	Monthly

# Approximate Investment Weights in Underlying TD ETFs<sup>2</sup>

## Core Portfolio of Passive ETFs

All TD ETF Portfolios are constructed with low-cost, broad market index ETFs. This creates **cost-efficient diversification benefits for investors**.

Name	Category	Ticker	TCON	TBAL	TGRO
TD Canadian Aggregate Bond Index ETF	● Fixed Income	<b>TDB</b>	70%	40%	10%
TD Canadian Equity Index ETF	● Canadian Equity	<b>TTP</b>	10%	20%	30%
TD U.S. Equity Index ETF	● U.S. Equity	<b>TPU</b>	10%	25%	40%
TD International Equity Index ETF	● International Equity	<b>TPE</b>	10%	15%	20%

<sup>2</sup> Approximate weights only. These weights may change due to market movements and portfolio manager discretion. For more up-to-date allocations please visit the [TD ETFs product page >](#).



# Meet our Portfolio Managers



## Laurie-Anne Davison, CFA, CAIA

### Vice President & Director, Lead of Passive Investing, TDAM

- Leads the integrated passive business and is the lead Portfolio Manager for all passive equity mandates
- Previously co-managed Quantitative Equity portfolios and was the lead Portfolio Manager of the U.S. and Canadian mandates. She continues to help manage the various quantitative ETF mandates.
- Holds a B.A. in Administrative and Commercial Studies, Finance and Economics from Western University and an M. Fin. from the Rotman School of Management at the University of Toronto



## Alex Sandercock, CFA

### Vice President, TDAM

- Portfolio Manager on the Quantitative Team supporting Equity Exchange-Traded Funds, and also co-leads the Passive Equity Funds
- Previously an IT Analyst supporting the firm's Trading and Portfolio Management teams and a Business Systems Analyst at TD Securities
- Holds a B. Math. from the University of Waterloo and a B.B.A. from Wilfrid Laurier University

## What Sets TDAM Apart?

### Depth of Experience



Our team of multi-disciplinary Portfolio Managers have an average of 22 years' experience.

### Breadth of Expertise



Our collaborative approach means you may benefit from a broad spectrum of expertise. Our deep and experienced Asset Allocation, Public Equities, Fixed Income, Alternative Investments and Commodities teams draw on the strength of many investment professionals to build disciplined portfolios that aim to meet our clients' needs.

### Disciplined Risk Management



Risk management is at the core of everything we do. We have a large and dedicated risk management team with a disciplined and objective research process with a focus on thorough analysis of company and industry fundamentals.



To see what ETF options are available to you, download our [ETF Product Guide >](#), available on our website [TD.com/etfs](https://www.td.com/etfs).

### New to investing? Invest in ETFs with TD:

- On your own with TD Easy Trade™
- On your own with TD Direct Investing
- With the help of a TD advisor

Find out more at [TD.com/ca/en/investing](https://www.td.com/ca/en/investing).

### Already investing?

- Contact your investment professional, or look for our [tickers >](#) wherever you invest!

#### Connect with TD Asset Management



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