

# CHFA Winners Showcase - 2026 Investor Conference

**Albany Club, Toronto, ON**  
**March 4, 2026**

An exclusive Investor Conference featuring 2 Award Winning  
Canadian Hedge Fund Managers

## **“Investors’ Inquiry”**

Welcome to this exclusive conference at which accredited individual investors, investment advisors, family offices, institutional investors and hedge fund industry experts have an opportunity to hear from some of Canada’s brightest and best hedge fund managers.

The Conference format features a panel of investment experts on-stage to interview each hedge fund manager in a sort of “kinder, gentler Dragon’s Den format”.



# 2025 CANADIAN HF AWARDS



## Celebrating, Supporting and Expanding Canada's Hedge Fund Industry

Dear Delegates,

Welcome, and thank you for joining us at the 11<sup>th</sup> Annual CHFA Winners Showcase Investor Conference. We are delighted to be back at the prestigious Albany Club.

This afternoon, **2 winners of 2025 Canadian Hedge Fund Awards** will each present their winning investment strategies and then face a panel of investment experts who will “look under the hood” to determine how best to use these strategies to improve investment portfolios.

A special thank you to our panel of investment experts: Loren Francis (**Highview Financial**) and Craig Machel (**Richardson Wealth**) for their very important contribution in preparing for, and participating in, today's investor conference.

Our Sponsors: **Fundata Canada and Newsfile** make this conference possible, and we thank them for their generosity and support.

Please plan to join us at THE 2026 Canadian Hedge Fund Conference and the **19<sup>th</sup> Annual Canadian Hedge Fund Awards Gala Dinner which we are planning to hold on Tuesday, October 20, 2026 in the Grand Banking Hall at One King West Hotel in Toronto**. Keep checking at [www.alternativeiq.com](http://www.alternativeiq.com) for updates. Follow us on X (formerly Twitter) @AlternativeIQ.

We hope you find today's presentations and discussions enlightening and useful. I look forward to the opportunity of being your MC for this event.

Warm regards,

A handwritten signature in black ink that reads "Julie".

Julie Makepeace  
Managing Director, Alternative IQ

**This Investor Conference is made possible by the generous support of its Sponsors and Partners:**



**and our media partner:**



# CHFA Winners Showcase 2026 – Investor Conference

## Agenda

- 2:00 Registration and Networking
- 2:30 Welcome and Opening Remarks  
Julie Makepeace, Managing Director, Alternative IQ
- 2:40 Hedge Fund Manager Presentations and Panel Q & A
- **Eire Gorman**, Vice President, Operations, and
  - **Gord Ross**, Regional Vice President, Sales  
[Capital Direct](#)  
*(The Capital Direct 1 Income Trust was the 1<sup>st</sup> Place Winner for best 10-year Return in the Mortgage Fund category of the 2025 Canadian Hedge Fund Awards.)*
  - **Doug Sereda**, Portfolio Manager and President,  
[Fieldhouse Capital](#)  
*(The Fieldhouse Global Managed Futures Fund was the 2<sup>nd</sup> Place Winner for best 1-year Return in the Global Macro/Managed Futures/Multi-Strategy category of the 2025 Canadian Hedge Fund Awards.)*
- 3:45 Cocktail Reception and Networking

# Investors' Inquiry

## Looking “under the hood” of award-winning hedge funds and how they can improve the performance of an investor portfolio

Certain hedge fund strategies can replace some, or all, of an allocation to traditional long-only equity, credit and/or fixed income investments and ought to reduce the overall volatility (i.e. reduce the risk) of the portfolio's public markets allocation, with a more attractive risk/reward profile.

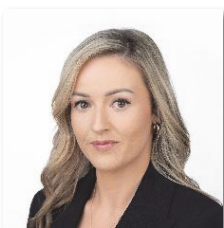
Other hedge fund strategies may have a low correlation to equity and credit markets and offer a higher probability of generating out-sized returns (albeit by taking on a higher level of risk).

In this conference, our award-winning Canadian hedge fund managers will address the key issues on investors' minds as they consider allocating to these hedge funds as replacements for and/or complements to other investments in their portfolios.

# CHFA Winners Showcase 2026

## Presenters

### Award Winning Hedge Fund Managers:



**Eire Gorman**, Vice President, Operations,  
**Capital Direct**

Éire Gorman is Vice President of Operations at Capital Direct, where she supports the day-to-day running and growth of the business across investor relations, HR, and internal operations. She is also licensed as an Exempt Market Dealing Representative and works directly with investors, helping them understand private mortgage investments and how they fit within a broader portfolio. Éire has been with Capital Direct for nearly eight years and holds an MBA from UBC Sauder School of Business. Outside of work, she enjoys spending time at the gym and travelling whenever she can.



**Gord Ross**, Regional Vice President, Sales  
**Capital Direct**

Gord Ross has joined Capital Direct Management Ltd. as the Regional Vice President, Sales for Central Canada. Gord works closely with some of Canada's best & brightest Investment Advisors who see the value that the Capital Direct 1 Income Trust can bring to their investment clientele's portfolios. Gord brings 20+ years of experience in the asset management industry, the majority of which has been spent in direct sales, or sales leadership, roles. Gord previously served as the Chief Sales Officer and Head of Canadian Distribution for W.A. Robinson Asset Management, and prior to that was the Senior Vice President and National Sales Manager for Fiera Investments and Natixis Investment Managers Canada Ltd. Gord is a graduate of the University of Western Ontario with a major in Economics, and he also possesses and maintains the Certified Financial Planner (CFP) designation.

Congratulations to the 2025 Canadian  
Hedge Fund Award Winners!

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# CHFA Winners Showcase 2026

## Presenters

### Award Winning Hedge Fund Manager:



***Doug Sereda, Portfolio Manager and President,***  
***Fieldhouse Capital***

As a Fund Manager and Founding Partner of Fieldhouse, Doug brings unparalleled expertise and vision to Fieldhouse. With a focus on absolute return strategies and innovative solutions, he leads with a commitment to deliver sophisticated, client-driven investment strategies that meet diverse financial objectives and create long-term value.

With over 30 years in the investment industry, Doug is a seasoned strategist, market technician, and senior portfolio manager. As President of Fieldhouse, he has pioneered the firm's approach to alternative asset management, specializing in automated trading program development and hedge solutions to achieve consistent, client-focused results.

## Your Event MC:



**Julie Makepeace**

*Managing Director, Alternative IQ  
President, Alliance Sales and Marketing, Inc.*

Ms. Makepeace launched Alternative IQ in 2014, after acquiring the Canadian Hedge Fund Awards franchise and running the first CHFA Winners Showcase investor conference that year. Alternative IQ is a division of Alliance Sales and Marketing, Inc. of which Julie has been President since founding the firm in 2000. Ms. Makepeace has supported numerous asset management companies in launching their firms and/or launching new investment products and can point to an impressive track record of capital-raising success. Her strategic planning skills and marketing expertise were grounded in years of senior marketing management positions with one of Canada's Schedule 1 Banks. In 1989 Julie was a founding executive at Working Ventures Canadian Fund, Canada's first national retail venture capital fund, where she was responsible for raising more than \$860 million in AUM and creating a new asset class in Canada. Ms. Makepeace has the CSC, CPH and OPD of the Canadian Securities Institute, is a Fellow of the Institute of Canadian Bankers and graduated with a Bachelor of Arts (Economics) degree from the University of Western Ontario.

## Investors' Inquiry" Panelists:



**Loren Francis**  
*Vice President and Principal*  
Highview Financial Group

With 30 years of capital market experience, Loren, VP & Principal, and Portfolio Manager, with HighView Financial Group, works closely with families and foundations, and collaborates with their trusted advisors, in all aspects of investment counselling, portfolio design and allocation, financial and tax planning, philanthropy and wealth stewardship. She is a member of the HighView Portfolio Strategy Committee, responsible for analysis, due diligence and ongoing monitoring of investment managers, researching new investment ideas and overseeing process and performance. Loren has a keen interest in ESG and Impact investment initiatives and has written many articles on these topics. Loren also has 20 years of experience as a board director in the not-for-profit sector and is currently on the Canadian Advisory Board of Right to Play, a charity dedicated to empowering children in disadvantaged communities through play. Loren completed her MBA at the University of Toronto, and holds the FCPA, CPA and CIM designations.



**Craig Machel**  
*Portfolio Manager, Investment Advisor*  
Richardson Wealth

As a Portfolio Manager, Craig works together with a select group of affluent clients and their families as well as corporations and foundations who share a common goal: to protect and grow their wealth in a reliable and predictable fashion. He provides highly personalized advisory services within a framework of disciplined, diversified portfolio construction, selecting from among the world's most successful and exclusive money managers. Thinking differently about how to ensure a positive impact in his clients' financial circumstances, Craig goes beyond traditional portfolio management in the equity and bond markets alone to include conservative and predictable alternative assets, offering more effective diversification and a benchmark that offers protection and peace of mind regardless of market conditions. Craig's designations include the Financial Management Association (FMA), the Canadian Investment Manager (CIM), and his life insurance license. Craig actively participates in the Canadian chapter of the Alternative Investment Management Association (AIMA) and presents as a guest speaker or panelist at various industry and private client events. A graduate from the University of Western Ontario with a BA in Economics, Craig is a frequent commentator on the BNN and in The Globe and Mail, as well as in other local and national media.



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# Invest in Canadian Homeowners.



## Winner of the 2025 CHF Awards - Mortgages



**10 Year Return Category**



**1 Year Return Category**

### Historical Returns Since Inception<sup>(1)</sup>:

Class F<sup>(2)</sup>

**8.32%**

Class C

**7.43%**

Class A

**8.16%**



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(1) Historical returns since inception (Class A (2006), Class C (2014), Class F (2016)) is based on Q3 2025 net income produced by that class of Units of the Trust after any discretionary reduction by Management in Income Participation. (2) Class F Units must be purchased through a third party dealer and are intended for managed accounts.

All investments carry risks and past performance is not an indication of future returns. This does not constitute an offer to the public to subscribe for units of the Trust. This document does not provide disclosure of all information required for an investor to make an informed investment decision. All subscriptions for the purchase of units must be made pursuant to available prospectus exemptions. Investors should read the current offering memorandum, especially the risk factors relating to a purchase of Units of the Trust, prior to making an investment decision.

# Global Managed Futures Fund

## Unlocking Opportunities Across Global Markets

### Fieldhouse Pro Funds Trust (FPFT) - Global Managed Futures Fund

The FPFT Global Managed Futures Fund employs a top-down systemic investment process designed to participate in long or short opportunities as favorable price or fundamental opportunities emerge. Our approach aims to deliver consistent absolute returns, regardless of prevailing market conditions.



#### Global Macro Strategy

We aim to identify and capitalize on macroeconomic trends for directional value trades across global economies.



#### Systematic Investment Approach

Our systematic investing combines technology and human expertise to target consistent portfolio outcomes in an unpredictable world.



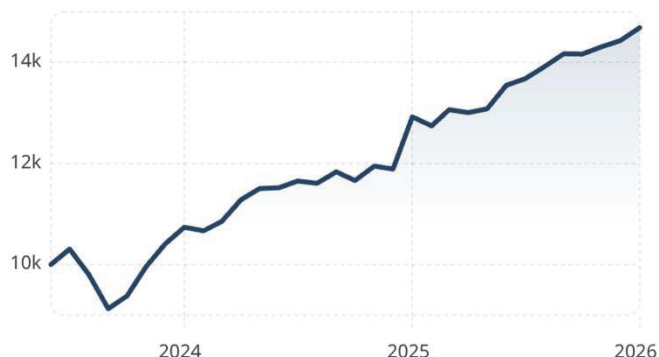
#### Targeting 15-25% Annual Returns

Our disciplined approach focuses on delivering meaningful absolute returns across all market cycles.

### A Globally Diverse Investment Universe

Our Global Managed Futures Fund takes a return-agnostic approach, seeking absolute returns from a diverse range of commodity, financial, interest rate, and currency futures contracts when opportunities arise.

#### Growth of \$10,000 Invested Since Inception



#### Precious Metal & Energy Markets

Precious metals markets like gold, silver, and platinum serve as safe havens and inflation hedges, while energy markets—driven by oil and natural gas—are driven by global supply and demand and geopolitics.

#### Agricultural & Softs

Agricultural commodities include grains and livestock, while softs like coffee, sugar, and cocoa often come from tropical regions. Both are shaped by weather, global demand, and supply chain factors.

#### Global Equity & Bond Futures

Equity futures provide exposure to worldwide stock market indices, while bond futures reflect interest rate conditions. Both respond to macroeconomic data, central bank policy, and investor sentiment.

#### Interest Rate & Currency Futures

Interest rate futures track central bank policies and economic indicators, influencing borrowing costs globally. Currency futures capture exchange rate movements shaped by trade flows and monetary policy.

# Global Managed Futures Fund

## Unlocking Opportunities Across Global Markets

### Return History

3-Month	3.7%
6-Month	7.4%
1-Year	13.7%
Since Inception	16.1%

### Risk Statistics

Risk Rating	Higher Risk
Standard Deviation	10.0%
Best Month	8.7%
Up Months	70%

### Monthly Returns

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2023							3.1	-4.9	-6.9	2.8	6.2	4.4	4.0
2024	3.2	-0.6	1.7	4.0	2.0	0.1	1.1	-0.4	2.0	-1.4	2.4	-0.5	14.3
2025	8.7	-1.4	2.5	-0.4	0.6	3.6	0.9	1.8	1.8	0.0	1.1	0.9	21.4
2026	1.8												1.8

### Fund Information (F Class)

Fund Structure	Exempt Market Trust
Base Currency	CAD
Fund Manager	Fieldhouse Capital Management
Portfolio Manager	Douglas Sereda
Fund Administrator	SGGG Fund Services
Fund Auditor	Doanne Grant Thornton

FundServ Code	FHC430
Minimum Investment	\$500
Management Fee	1%
Incentive Fee	10%
Trailer Fee	N/A
Liquidity	Monthly (T+10)

†All performance and risk statistics are based on monthly total returns of the Fieldhouse Pro Funds Trust – Series C Global Managed Futures Fund in Canadian dollars since inception at July 1st, 2023 as of January 31st, 2026. All returns are time-weighted total returns of the F class, net of fees, and annualized for periods one year or greater. The rate of return and growth of \$10,000 is used only to illustrate the effects of the compound growth rate and is not intended to reflect future values of the investment fund. Fieldhouse Capital Management Inc. is the Investment Fund Manager, Portfolio Manager and trustee of Fieldhouse Pro Funds Trust Advisor Series funds. Fieldhouse Pro Funds Trust funds are subject to management fees, trailing commissions, incentive fees and administration fees. For detailed information on fees see the Fieldhouse Pro Funds Trust offering memorandum and the Series C offering memorandum supplement or the term sheets. Series C of Fieldhouse Pro Funds Trust was previously Class C of Fieldhouse Pro Funds Inc. which had an inception date of April 1st, 2016. Fieldhouse Pro Funds Inc. converted to Fieldhouse Pro Funds Trust on January 1st, 2022. Historical fund performance for previous strategies is available upon request. The Fieldhouse Pro Funds Trust offering memorandum and the Series C offering memorandum supplement contain additional information that should be considered by all investors prior to investing. The risk and return profile of Fieldhouse Pro Funds Trust funds may not be suitable for all investors. Investors should seek professional advice before making an investment. The historical returns presented here are not an indication of future performance. The risks of this investment are described in the offering memorandum and offering memorandum supplement. Future returns may be positive or negative. Do not use this webpage as the sole means to decide how to invest. There are many important factors to consider, and investors should seek professional advice that can assess their personal circumstances and risk appetite. This webpage is not a solicitation for investment.



# 2025 CANADIAN HF AWARDS