

Investors Survey 2023

231
Responses

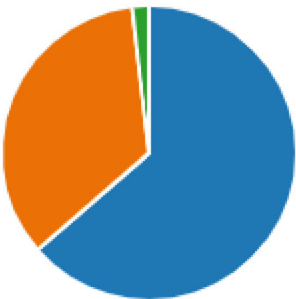
11:49
Average time to complete

Active
Status

1. The survey begins with questions about you. These are for classification purposes only.

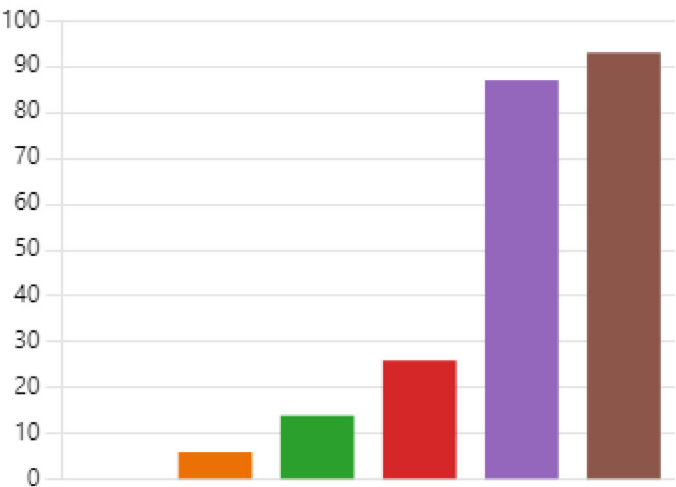
Gender

Man	138
Woman	75
Prefer not to say	4



2. Age

Under 25	0
25-40	6
41-55	14
56-64	26
65-75	87
over 75	93



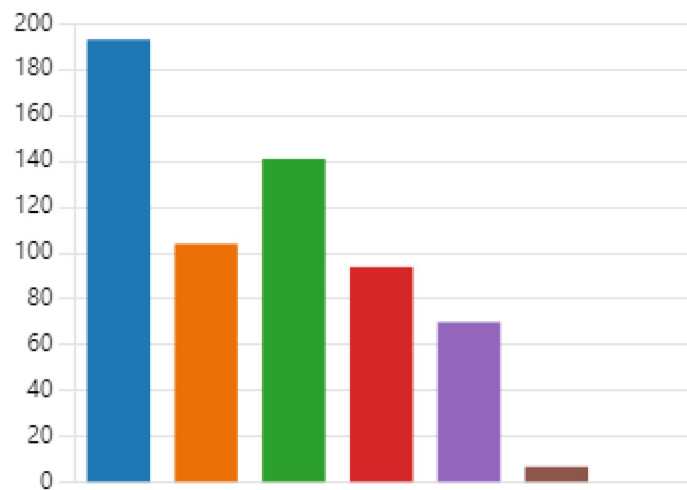
3. Number of years you've been a Tradex Member

Under 5	21
5-10	33
11-20	39
over 20	126



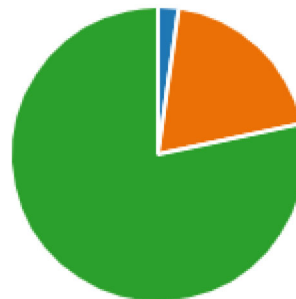
4. I hold the following investment(s) through Tradex (check all that apply):

Tradex Equity Fund Limited	193
Tradex Bond Fund	104
Tradex Global Equity Fund	141
Tradex Investment Savings Acco...	94
Third-party Funds	70
ETF's	7
Annuity, Segregated fund or oth...	0



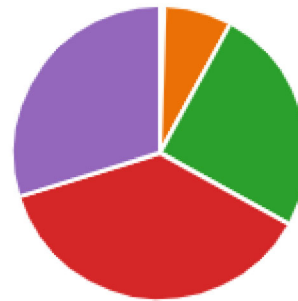
5. Total value investments you own through Tradex

Under \$10,000	5
\$10,000-50,000	43
over \$50,000	174



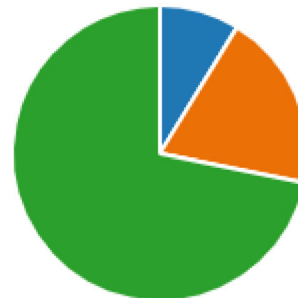
6. How frequently are you in contact with the Tradex Team?

Weekly	1
Monthly	16
Quarterly	54
Annually	80
Less	64



7. Would you like the Tradex Team to reach out to you on a regular basis?

Yes, quarterly	18
Yes, annually (contact to schedu...	40
No. (current contact for TFSA, m...	148

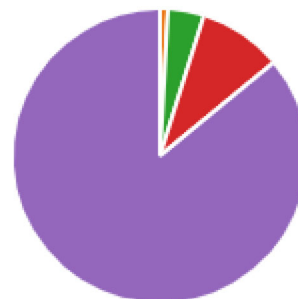


8. The next section seeks to assess the relevant importance you place on our various products and services to ensure Tradex remains your financial provider of choice.

Please tell us the degree to which the following items are important to you:

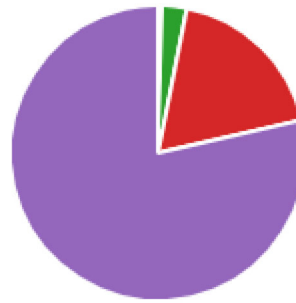
That Tradex is 100% member-owned and operates on a not-for-profit basis.

Not at all important	0
Somewhat un-important	2
Neutral	9
Somewhat important	21
Very important	196



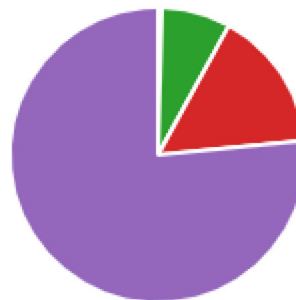
9. That the Tradex Fund MERs after annual rebates continue to be low for their category.

Not at all important	1
Somewhat un-important	0
Neutral	6
Somewhat important	41
Very important	176



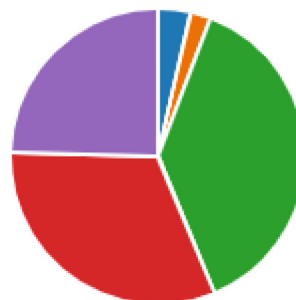
10. Receiving unbiased investment advice.

Not at all important	1
Somewhat un-important	0
Neutral	17
Somewhat important	35
Very important	173



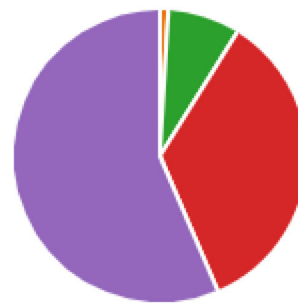
11. Assistance from all Tradex Advisors vs being assigned to only one

Not at all important	8
Somewhat un-important	5
Neutral	85
Somewhat important	71
Very important	55



12. That Tradex has over a over 60-year stable history of evolving financial services.

Not at all important	0
Somewhat un-important	2
Neutral	18
Somewhat important	78
Very important	127



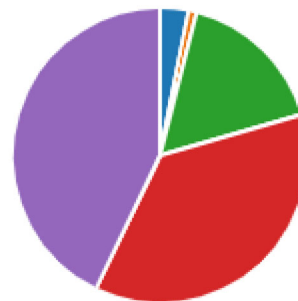
13. Annual Meeting Portfolio Managers' presentations.

Not at all important	15
Somewhat un-important	15
Neutral	82
Somewhat important	63
Very important	48



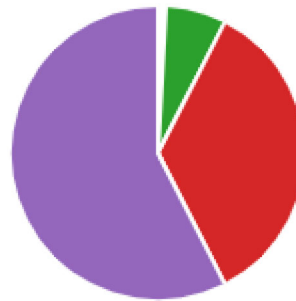
14. That 10 of the 11 Tradex Directors are independent.

Not at all important	7
Somewhat un-important	2
Neutral	37
Somewhat important	82
Very important	96



15. The relative performance of your mutual funds vs. others in their category.

Not at all important	1
Somewhat un-important	1
Neutral	15
Somewhat important	79
Very important	130



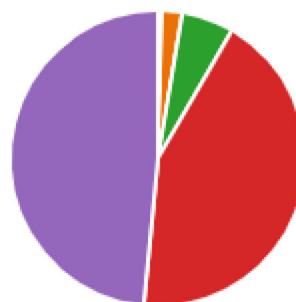
16. That Tradex is available only to public servants and their families.

Not at all important	11
Somewhat un-important	16
Neutral	70
Somewhat important	80
Very important	51



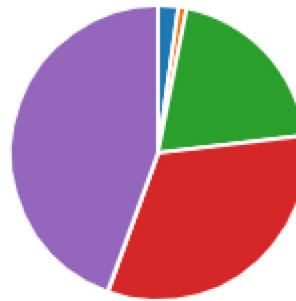
17. Low turnover of advisors.

Not at all important	1
Somewhat un-important	5
Neutral	13
Somewhat important	98
Very important	110



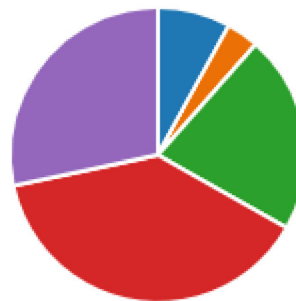
18. Customized individual portfolios

Not at all important	5
Somewhat un-important	2
Neutral	45
Somewhat important	73
Very important	100



19. Socially responsible investing

Not at all important	18
Somewhat un-important	8
Neutral	49
Somewhat important	87
Very important	64



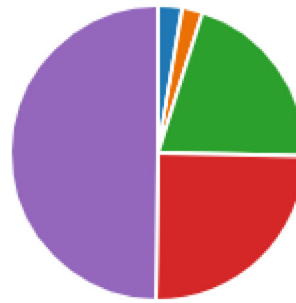
20. That your advisor is salaried vs. commissioned.

Not at all important	0
Somewhat un-important	4
Neutral	14
Somewhat important	59
Very important	148



21. Ability to consolidate investments with a single firm.

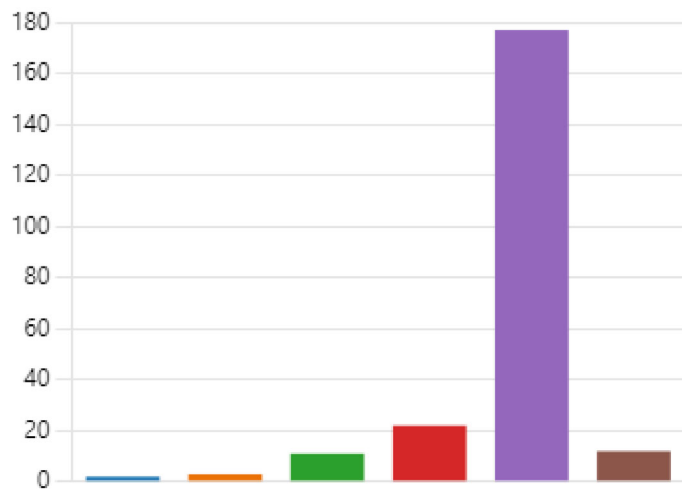
Not at all important	6
Somewhat un-important	5
Neutral	46
Somewhat important	56
Very important	112



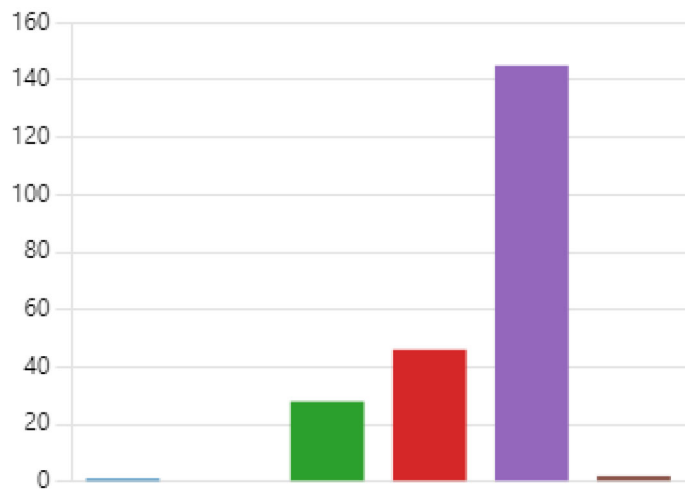
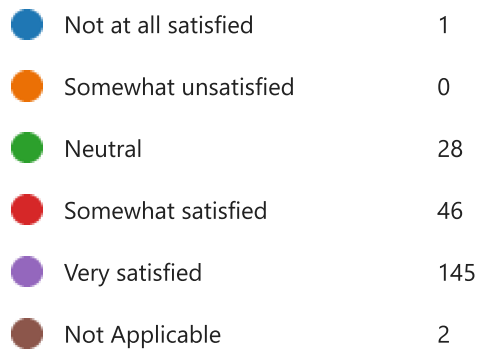
22. The investment industry in Canada has been undergoing changes for several years flowing from ongoing debates around additional disclosure requirements and the methods of compensation. The next section of the survey includes a few questions to inform us about our members' perspectives on these areas.

The service provided by staff.

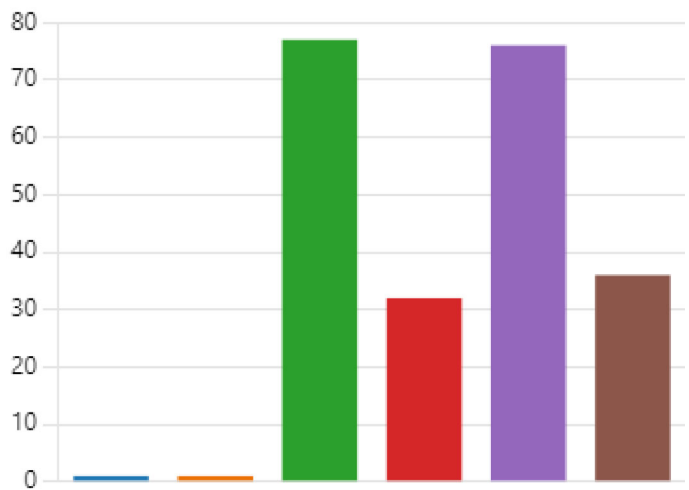
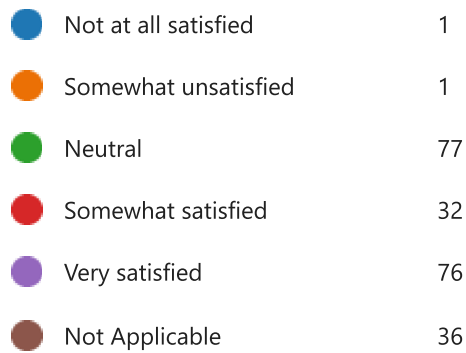
Not at all satisfied	2
Somewhat unsatisfied	3
Neutral	11
Somewhat satisfied	22
Very satisfied	177
Not Applicable	12



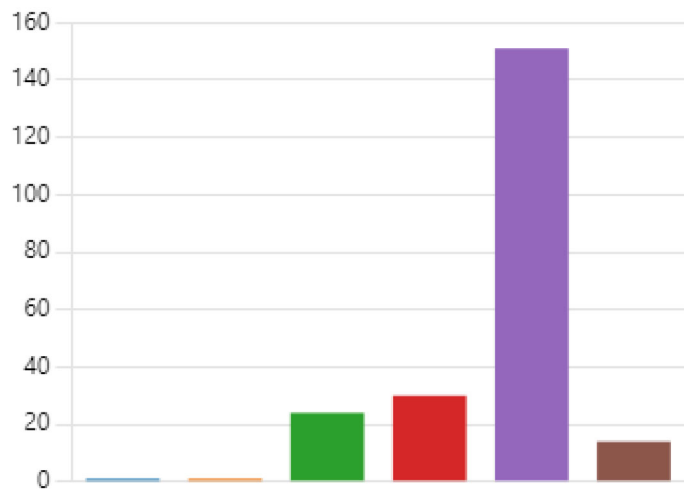
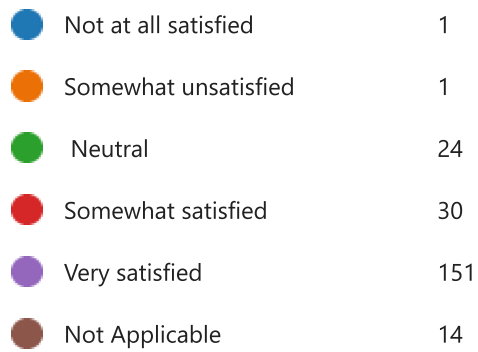
23. The Quarterly Newsletter



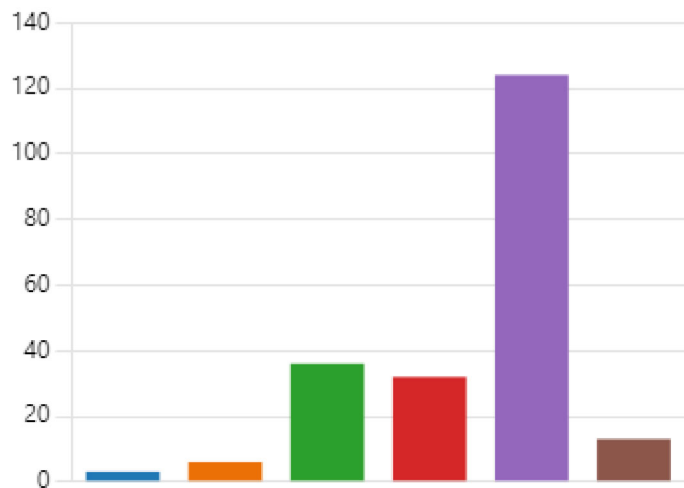
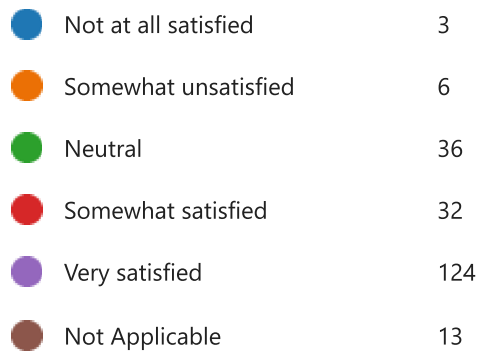
24. The Annual Meeting



25. Our investment advice

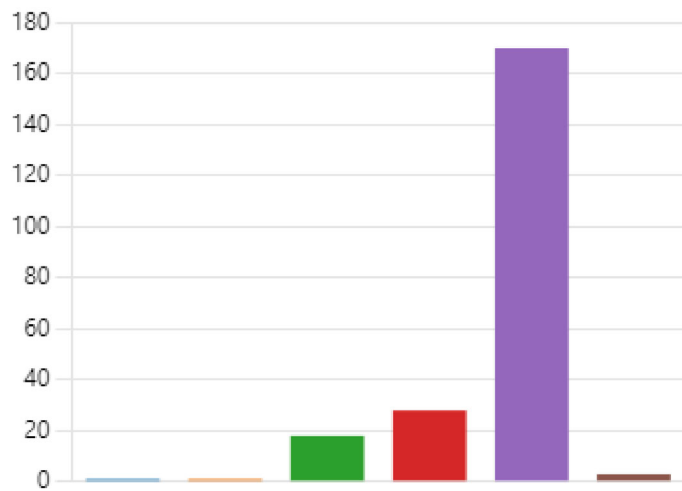


26. Our website [Tradex.ca](https://www.tradex.ca)



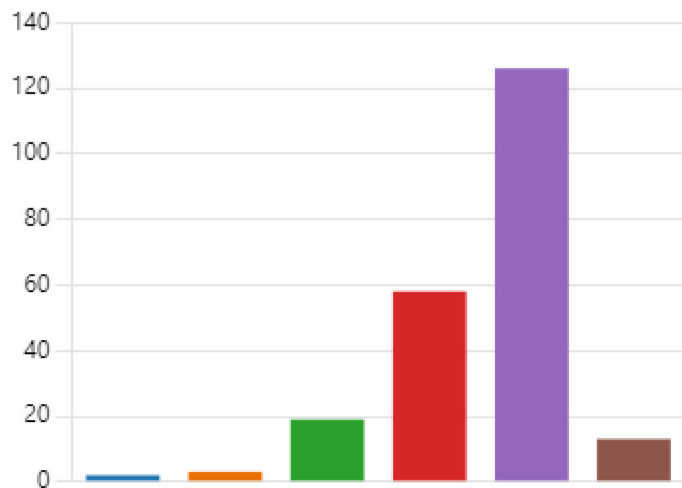
27. The level of fees and charges

Not at all satisfied	1
Somewhat unsatisfied	1
Neutral	18
Somewhat satisfied	28
Very satisfied	170
Not Applicable	3

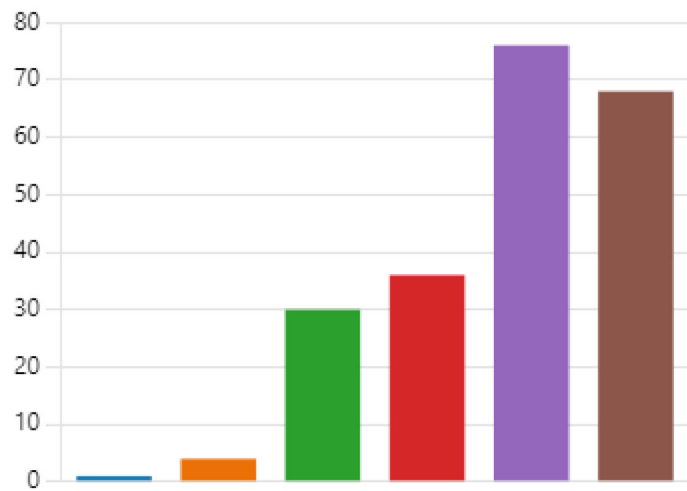
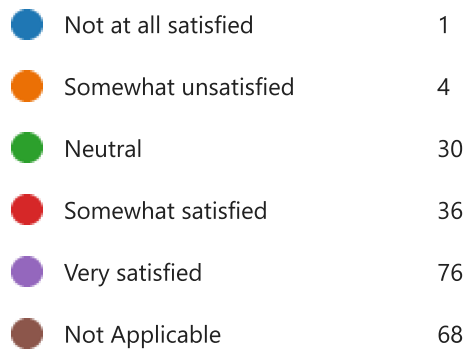


28. Tradex Equity Fund

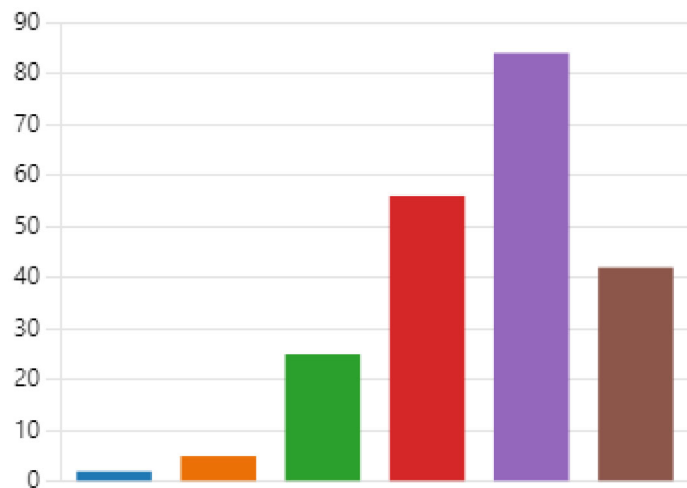
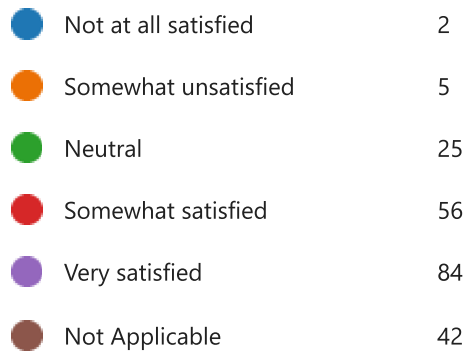
Not at all satisfied	2
Somewhat unsatisfied	3
Neutral	19
Somewhat satisfied	58
Very satisfied	126
Not Applicable	13



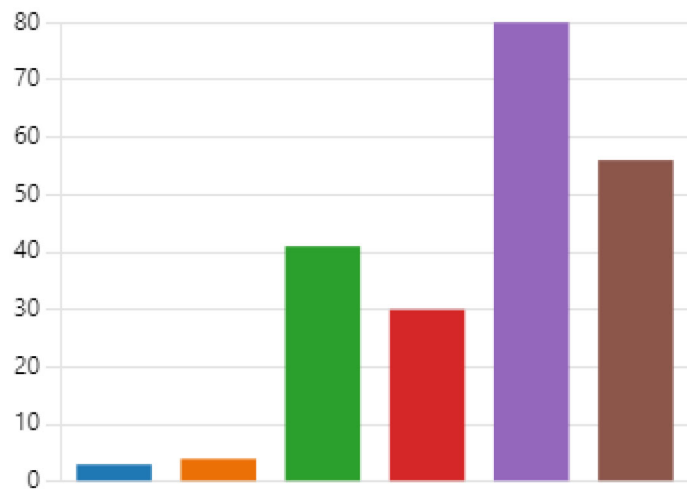
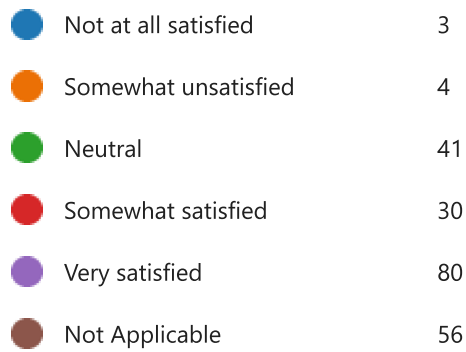
29. Tradex Bond Fund



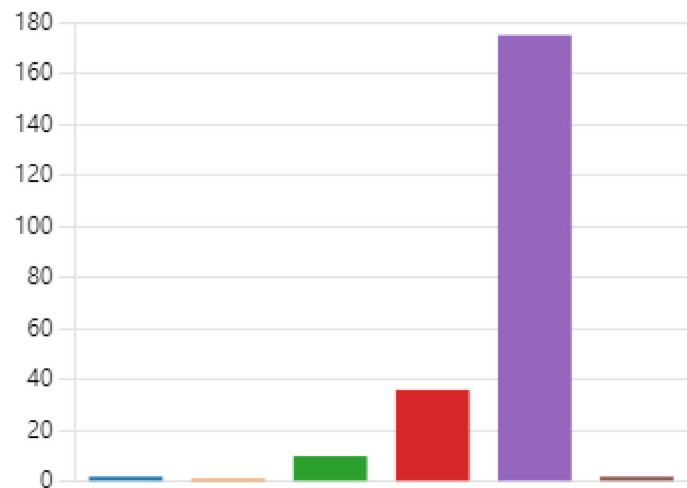
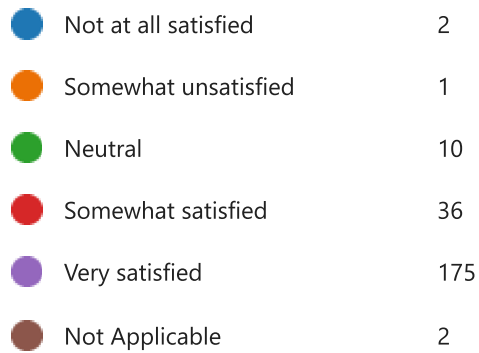
30. Tradex Global Equity Fund



31. Tradex Investment Savings



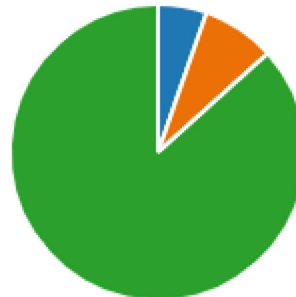
32. Your overall satisfaction



33. We are always working to stay current in the way we interact with both existing and potentially ne Tradex members, which includes our presence on social media. We have accounts on Facebook, Twitter, LinkedIn and Youtube. The next section seeks your feedback on how we are doing in our use of social media tools.

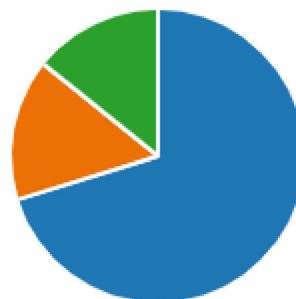
Do you/would you follow Tradex on social media to receive information, updates or online seminars? (i.e Facebook, Twitter)

● Yes	12
● Somewhat	18
● No	195



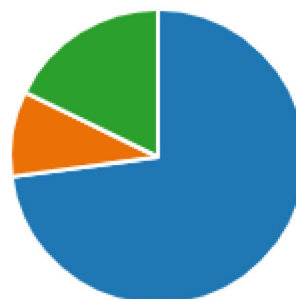
34. Are you aware we offer electronic Quarterly Reports and monthly statements?

● Yes	158
● Somewhat	35
● No	32

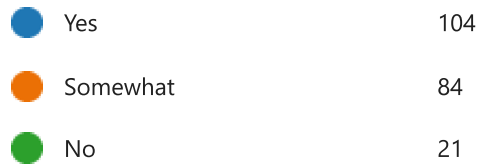


35. Are you aware of the Tradex Referral program through which we provide existing and referred members with money towards their Tradex accounts?

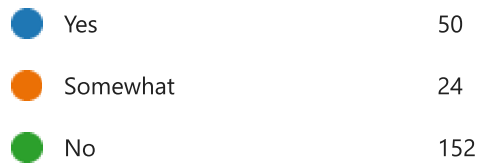
● Yes	164
● Somewhat	21
● No	40



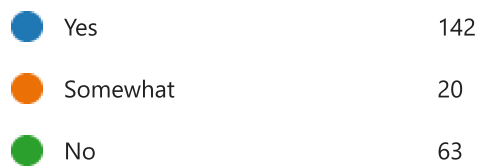
36. Do you like the Tradex referral program?



37. Are you aware that you can access the #1 brokerage QTrade through Tradex?

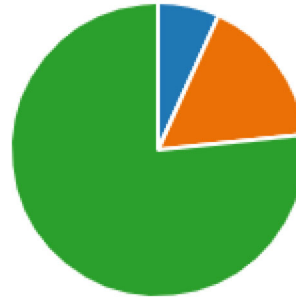


38. Are you aware that you can hold third party mutual funds, such as those offered by the banks, CI Funds, Mackenzie and other without commission?



39. Would our Life Insurance be of interest to you or someone you know?

Yes	15
Somewhat	37
No	171



40. Would you and your family benefit from an inter-generational transfer seminar hosted by Tradex?

Yes	55
Somewhat	53
No	113



41. Would you prefer more extensive account reporting if it meant a higher MER for the Tradex Funds?

Yes	19
Somewhat	20
No	181

