

Scorecard



Investment Manager

Burgundy Asset Management Ltd.

Fund Name

Burgundy U.S. Smaller Companies Fund

As of date

2025-09-30

	1 Year		4 Years		7 Years		10 Years	
	Annualized	QT	Annualized	QT	Annualized	QT	Annualized	QT
Annualized ROR	10.86	2	12.62	1	14.68	1	14.43	1
Benchmark	14.10		6.22		7.77		10.13	
Value Added	-3.24		+6.40		+6.91		+4.30	

	2025-09-30		2024-09-30		2023-09-30		2022-09-30	
	Annual ROR	QT	Annual ROR	QT	Annual ROR	QT	Annual ROR	QT
Annual ROR	10.86	2	25.44	2	20.97	1	-4.38	1
Benchmark	14.10		26.40		7.32		-17.77	
Value Added	-3.24		-0.95		+13.64		+13.39	

	1 Year	QT	4 Years	QT	7 Years	QT	10 Years	QT
Standard Deviation	17.09	1	15.40	1	15.75	1	14.36	1
Information Ratio	0.00	2	-1.55	1	-1.43	1	-0.42	1
Sharpe Ratio	0.45	2	0.60	1	0.79	1	0.88	1
Up Capture	68.58	4	80.20	4	82.35	3	81.66	3
Down Capture	72.31	1	57.47	1	56.39	1	59.36	2

Asset Class: Equities. Region: US. Category: Small Cap, Small Mid Cap.

Benchmark: iShares Russell 2000 ETF

Number of Products in Peer Group: 99

1st Quartile	Top 25%
2nd Quartile	Above Average
3rd Quartile	Below Average
4th Quartile	Bottom 25%

Positive Value Added

outperformance compared to the benchmark

Negative Value Added

underperformance compared to the benchmark