



2677 E 17<sup>th</sup> St. Suite 100  
 Ammon, ID 83406  
 (208) 881-5505  
[www.3peaksfinancial.com](http://www.3peaksfinancial.com)



## March 2025 Portfolio Report

**Shane Hill**

**Connor Dye**

This brief monthly report is designed to give you a quick update on the funds we review each month (by asset class) and any changes we are making.

For those of you who have a 3 Peaks Financial Managed account, this report will help you follow and understand how your mutual fund portfolio is being managed. If you don't have a 3 Peaks Financial Managed account, this report will show you how we manage clients' accounts, and give you an idea of how we can help you!

*The best compliment you could possibly give us is the referral of your friends & family.*

**Thank you for your trust & confidence!**

### Funds Reviewed by Asset Class & Action Taken

Fund Name	Morningstar Rating	Asset Class	Added	Removed	Kept
Putnam Short-Term Municipal Income Fund	★★★★	Muni National Short			✓
Putnam Strategic Intermediate Municipal Fund	★★★★★	Muni Natnl Intermed			✓
Franklin Convertible Securities Fund	★★★★★	Convertibles			✓
Columbia Real Estate Equity Fund	★★★★★	Real Estate			✓
Pioneer International Equity Fund	★★★★	Foreign Large Blend			✓
Eaton Vance Emerg & Frontier Countries Fund	★★★★★	Emerging Markets			✓
Federated Hermes MDT Mid Cap Growth Fund	★★★★★	Mid Cap Growth			✓
Congress Small Cap Growth Fund	★★★★★	Small Cap Growth			✓

*Investors should consider the investment objectives, risks, charges, and expenses of the investment company carefully before investing. The prospectus and, if available, the summary prospectus contain this and other important information about the investment company. You can obtain a prospectus and summary prospectus from your financial representative. Read carefully before investing. Investing in mutual funds involves risk, including possible loss of principal. An increase in interest rates may cause the price of bonds and bond mutual funds to decline. No strategy assures success or protects against loss. Investing in real estate involves special risks such as potential illiquidity and may not be suitable for all investors. International investing involves special risks such as currency fluctuation and political instability. These risks are often heightened for investments in emerging markets. The prices of small and mid-cap stocks are generally more volatile than large cap stocks. Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through 3 Peaks Financial, LLC., a registered investment advisor and separate entity from LPL Financial.*

1-634974