

# Our institutional approach

## Our story

Mackenzie Investments, founded in 1967, is a leading Canadian global asset manager, headquartered in Toronto with additional investment teams in Boston, Dublin and Hong Kong. As part of IGM Financial Inc., a subsidiary of Power Corporation with a history dating back to 1925, Mackenzie benefits from the financial stability of a deep corporate structure while maintaining a multi-boutique investment management profile.



Our distinct and experienced investment teams offer both fundamental and quantitative approaches with expertise across traditional and non-traditional asset classes, including equities, alternatives, currency and multi-asset strategies.

We are committed to delivering strong investment performance and offering innovative, relevant solutions to our clients by drawing on the experience and unique perspectives gained over 40+ years of building institutional client relationships.

## Boutique mindset, consultative approach

Our firm's optimal size and nimbleness allows us to provide specialized solutions, through a multi-boutique structure and distinct investment philosophies, while benefiting from the stability & scale of a global asset management solutions provider.

### Multi-boutique structure & distinct investment philosophies

Our firm's autonomous multi-boutique structure allows each investment team to have their expertise and views fully reflected in their portfolios, identifying and encouraging each team's performance edge.

### Proven investment strategies & consultative approach

Our consultative approach allows us to develop specialized and innovative solutions for clients, delivering an exceptional level of personalized service.

### Stability & scale of a global asset management solutions provider

Our firm benefits from the financial stability of a global diversified management and holding company, while maintaining our entrepreneurial culture and independent thinking.

## Our investment teams

Mackenzie Investments is headquartered in Toronto with additional investment teams in Boston, Dublin and Hong Kong. Our investment management organization delivers its investment offerings through a multi-boutique structure, with independent in-house investment teams that each have a distinct focus and investment approach. Our boutique approach philosophy promotes diversification of styles and ideas, and provides Mackenzie with a breadth of expert, specialist capabilities.

**10+**

### Global investment teams

headquartered in Toronto with members on the ground in Boston, Dublin and Hong Kong.

**100+**

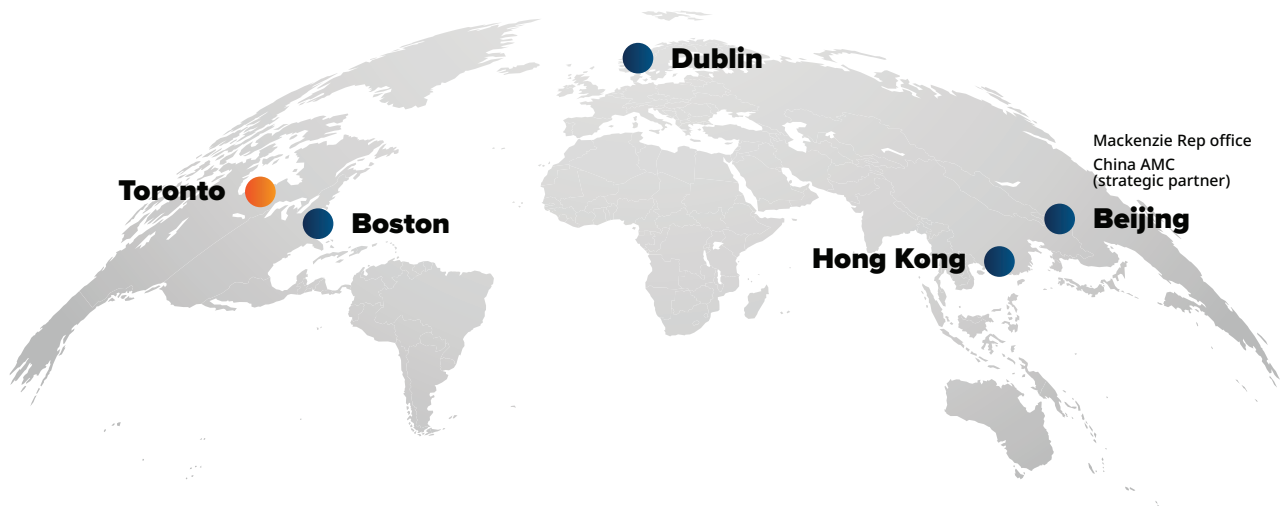
### Investment professionals

well resourced and supported, working in local markets while demonstrating a global reach.

**\$122B\***

### Assets under management

including institutional and sub-advised mandates that total \$60B in Canada, the U.S., Europe and China.



## Our strategies

We lead with our handpicked, carefully constructed strategies, customized for institutional clients and tailored by region. We manage risk rigorously across all of our investment solutions, investing to meet our clients' objectives and long-term, risk-adjusted performance. We offer a broad range of specialist investment capabilities across asset classes, geographies and sectors.

**Quantitative Equities**



**Fundamental Equities**



**Fixed Income**



**Multi-Assets and Alternatives**

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As of March 30, 2020. \*Assets reported in CAD, approximately USD 87B, EUR 79B.

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