



万信投资

万变前景 信心取胜

万信投资是一家领先的资产管理公司，与投资者及其理财顾问合作。我们对投资者的承诺是帮助他们实现财务成功，对未来充满信心。



为Power Financial集团
成员公司，其管理资产达
1.5万亿加元*



1298亿加元**
管理资产



30亿加元***
管理的交易所交易基金ETF
资产



980万加元
通过万信投资慈善基金会捐赠
资产



安心的服务

- › 是加拿大唯一一家为残疾人提供注册残疾储蓄计划（RDSP）的独立公司
- › 通过注册教育储蓄计划（RESP）为下一代储蓄
- › 万信慈善捐助计划为下一代传承遗产
- › 通过税务和遗产规划方面的建议和支持，使您的财务计划最大化
- › 超过10万加元的账户受益于私人财富解决方案和优选定价



回馈社区

万信投资慈善基金会是一个非营利组织，协调万信的慈善捐赠和志愿服务，支持加拿大各地的慈善机构。



爱心慈善

万信投资积极回馈社会，被慈善机构加拿大形象（Image Canada）认证评为【关怀企业】，【关怀企业】用于表彰为社区积极做贡献的企业。



万信投资是联合国支持的两项原则的签署企业：责任投资原则和联合国妇女赋权原则。

*截至2017年12月31日。

**截至2018年12月31日。包括IG国际（都柏林/香港）和IG地产基金管理资产。

***截至2018年12月31日。

获奖表现



晨星公司评级

- > 万信收益基金
- > 对称保守组合企业类基金
- > 对称保守组合
- > 万信加拿大增长平衡基金
- > 万信策略收益基金
- > 万信加拿大增长基金
- > 万信美国中型企业增长基金
- > 万信策略债券基金
- > 万信投资级浮动利率基金
- > 万信美国全企业增长基金
- > 万信月收入保守组合

北京
万信驻中国办事处
与中国华夏基金

香港

巴黎
TOBAM Smart Beta

都柏林

蒙特利尔

多伦多

波士顿
全球量化股票

罗德岛
PAX World Management

纽约
洛克菲勒

● 办事处 ● 战略合作伙伴

100+
全球专业投资人士

14
投资团队

- > 投资专家
股票，固定收益产品，另类投资策略
- > 创新者
资产配置，基本面和量化分析
- > 投资团队由综合研究和专门的风险管理支持

我们致力于提供卓越的风险调整后回报，
帮助投资者在他们的时间范围内获得财务上的成功。

我们通过共同基金、交易所交易基金ETF、另类投资、私人财富池和管理解决方案
来提供创新和专业知识。

询问您的理财顾问 关于万信投资如何可以帮助您获得财务成功。

中文译本仅供参考，以英文版为准。

Commissions, trailing commissions, management fees, and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

Morningstar Star Ratings reflect performance of Series F as of February 28, 2019, and are subject to change monthly. The ratings are an objective, quantitative measure of a fund's historical risk-adjusted performance relative to other funds in its category. Only funds with at least a three-year track record are considered. The overall star rating for a fund is a weighted combination calculated from a fund's 3, 5, and 10-year returns, as available, measured against the 91-day treasury bill and peer group returns. A fund can only be rated if there are a sufficient number of funds in its peer group to allow comparison for at least three years. If a fund scores in the top 10% of its fund category, it gets 5 stars; if it falls in the next 22.5%, it receives 4 stars; a place in the middle 35% earns a fund 3 stars; those in the next 22.5% receive 2 stars; and the lowest 10% receive 1 star. For more details on the calculation of Morningstar Star Ratings, see www.morningstar.ca. Quartile rankings and peers beaten are calculated by Mackenzie Investments based on the fund series-level data Morningstar provides. The CIFSC categories, Star Ratings, number of funds in each category, and annual compounded performance for the standard periods are: Mackenzie Income Fund Series F, Canadian Fixed Income Balanced category: 1 year - n/a stars 3.1%, 3 years - 4 stars (461 funds) 5.3%, 5 years - 5 stars (364 funds) 4.8%, 10 years - 5 stars (152 funds) 7.1%. Symmetry Conservative Portfolio Class Series F, Canadian Fixed Income Balanced category: 1 year - n/a stars 1.5%, 3 years - 4 stars (461 funds) 4.8%, 5 years - 5 stars (364 funds) 4.1%. Symmetry Conservative Portfolio Series F, Canadian Fixed Income Balanced category: 1 year - n/a stars 1.6%, 3 years - 4 stars (461 funds) 4.8%, 5 years - 5 stars (364 funds) 4.2%. Mackenzie Canadian Growth Balanced Fund Series F, Canadian Equity Balanced category: 1 year - n/a stars 4.5%, 3 years - 5 stars (381 funds) 9.9%, 5 years - 5 stars (300 funds) 10.4%, 10 years - 4 stars (164 funds) 9.6%. Mackenzie Strategic Income Fund Series F, Canadian Neutral Balanced category: 1 year - n/a stars 3.6%, 3 years - 5 stars (597 funds) 9.0%, 5 years - 5 stars (452 funds) 5.7%, 10 years - 5 stars (163 funds) 11.2%. Mackenzie Canadian Growth Fund Series F, Canadian Focused Equity category: 1 year - n/a stars 5.1%, 3 years - 5 stars (583 funds) 13.7%, 5 years - 5 stars (438 funds) 13.9%, 10 years - 4 stars (203 funds) 12.8%. Mackenzie U.S. Mid Cap Growth Class Series F, US Small/Mid Cap Equity category: 1 year - n/a stars 20.1%, 3 years - 5 stars (251 funds) 18.1%, 5 years - 5 stars (144 funds) 13.4%, 10 years - 4 stars (66 funds) 16.2%. Mackenzie Strategic Bond Fund Series F, Canadian Fixed Income category: 1 year - n/a stars 2.7%, 3 years - 5 stars (415 funds) 3.0%, 5 years - 5 stars (340 funds) 3.1%. Mackenzie Investment Grade Floating Rate Fund Series F, Canadian Short Term Fixed Income category: 1 year - n/a stars 1.5%, 3 years - 5 stars (205 funds) 2.4%. Mackenzie U.S. All Cap Growth Fund Series F, US Equity category: 1 year - n/a stars 13.2%, 3 years - 5 stars (1107 funds) 19.1%, 5 years - 5 stars (706 funds) 15.3%, 10 years - 4 stars (293 funds) 16.0%. Mackenzie Monthly Income Conservative Portfolio Series F, Global Fixed Income Balanced category: 1 year - n/a stars 3.1%, 3 years - 5 stars (426 funds) 5.7%.

