

Goals-based investing with Mackenzie multi-asset solutions

What are multi asset solutions?

A multi-asset investment approach builds a portfolio solution by combining multiple investments across asset classes (such as equities and fixed income), investment strategies (like active and passive, alternatives, growth and value, etc.), geographies and more.

Multi-asset portfolios focus on delivering predefined outcomes for clients, such as capital growth, defensive capital growth, stable income streams or other goals. They seek to achieve these desired outcomes by investing in a curated set of investments.

A diversified approach is the hallmark of multi-asset investing. It helps clients reach their goals by producing attractive returns while limiting unintended risk exposures. Different asset classes and investment strategies tend to behave differently as market conditions change.

Spreading exposure to a broad set of investments helps smooth returns over time, by allowing investors to benefit from a larger number of market movements and limiting negative outcomes from any single investment source.

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Multi-asset solutions

Managed by Mackenzie's Multi-Asset Strategies Team, our well-diversified, single-ticket solutions combine expert asset allocation with sophisticated design. The result is a suite of flexible solutions that are fully integrated and meticulously risk managed. They allow investors to focus on the bigger picture and leave the investment management duties to professional asset allocators.

Symmetry Portfolios

Mackenzie's longest-standing suite of actively managed solutions primarily draws upon our extensive mutual fund, ETF and alternatives product shelf. Moreover, the Multi-Asset Strategies Team leverages its full expertise to design bespoke solutions that address any remaining investment needs.

The result is a set of actively managed portfolios that are optimally diversified with a goal of maximizing returns while smoothing out volatility across a range of risk tolerances and investment objectives.

Mackenzie ETF Portfolios

We've combined the cost efficiency of ETFs with the convenience of mutual funds in an attractively priced, single-fund, core solution. The portfolios are actively managed and principally draw upon Mackenzie's deep and diverse ETF lineup.

Their goal is to maximize returns while smoothing out volatility across a range of risk tolerances and investment objectives. These solutions are suitable for all investors, especially those who are cost-conscious.



Mackenzie Monthly Income Portfolios

Designed to provide growth and consistent income, these portfolios help protect investor capital from market volatility. Ideal for income-seeking investors, such as retirees, these portfolios offer a reliable 4% fixed monthly distribution to cover regular expenses while also providing growth opportunities.

The portfolios are well diversified across regions and asset classes with particular emphasis on investing in higher income producing securities. The portfolios employ a wide array of risk reduction strategies, including the use of options, to help mitigate market declines.



For more information about Mackenzie's multi-asset solutions, please contact your financial advisor.

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.

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