



Mackenzie US Mid Cap Opportunities Fund

The sweet spot of growth and stability

Why you need US mid caps

Canadian investors often feel more comfortable investing in large, stable and established Canadian companies such as RBC and Canadian Tire. However, this can impact your portfolio's return potential by missing out on growth sectors not available in Canada. This is particularly the case when yields are at a historic low and investors are struggling to find growth. US mid caps can offer a sweet spot between small, fast-growing businesses, and large, established companies. These companies are typically more stable than small cap companies and offer more growth potential than large caps. US mid caps in particular tend to be innovative companies with potential to grow, thereby growing your investments.

Why Mackenzie US Mid Cap Opportunities Fund

The fund has some key advantages, both in the quality of the companies it contains and the diversification it brings.

Higher growth potential:

The fund aims to invest in innovative, high-quality mid-size US growth companies that create value by developing better, faster and cheaper products and services. The fund also focuses on long-term trends which have the potential to make these innovative businesses more sustainable over time (rather than being seasonal or cyclical and therefore affected by economic cycles), these companies have the potential to grow even during an economic downturn.

Diversification:

By including companies from outside of Canada, you benefit from diversification by investing in innovative sectors, such as technology and healthcare, which are not available to the same level in the Canadian market. The mid cap space may also provide potential diversification benefits relative to US large caps, with far less concentration among its largest constituents.

The mid cap space has less concentration risk.

	Top 10 names: company concentration %
S&P 500 Index (Large caps)	26.6%
Russel Mid Cap Index (Mid caps)	5.20%

Source: Morningstar, SPY and IWR ETFs, May 31, 2022

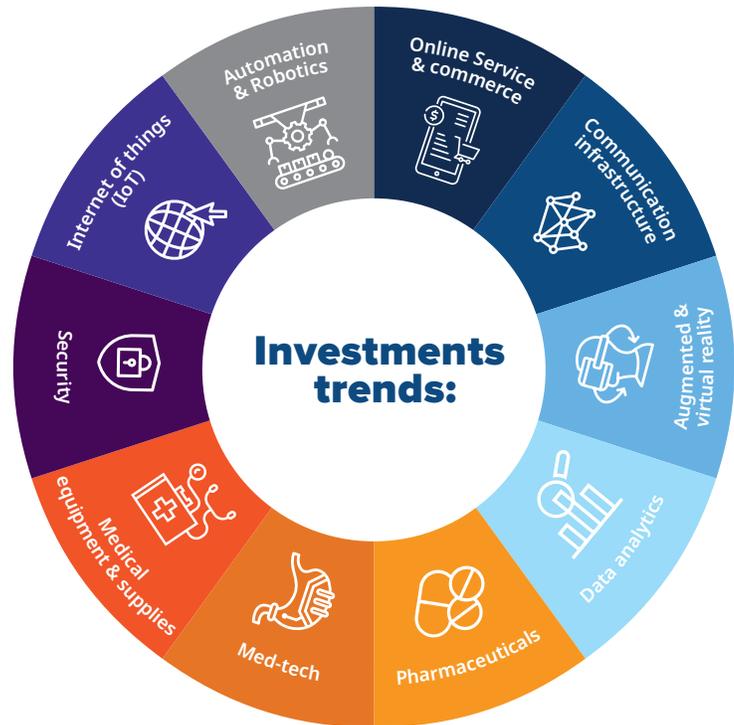
How it works

Rigorous research to explore a lesser-known market:

US mid cap companies are sparsely covered: this means that there is often limited analyst research available. The investment team carries out in-depth research on these sparsely covered companies to find high-quality, innovative businesses with the potential to grow independently of the market. The team focuses on companies with strong management, good growth prospects, strong balance sheets, and a reasonable price.

Uncovering real business opportunities:

The team's investment edge is their ability to distinguish between ideas and real business opportunities. The team of experts understands future trends and applies a consistent, proven investment strategy. Its unique, agile structure allows for superior information-sharing and confident, efficient decision-making aims to capitalize on real business opportunities at attractive prices.



Why invest with Mackenzie

As a Canadian-owned global asset management provider, we've been helping advisors deliver the best possible advice and investment solutions for more than 50 years. With over C\$200 billion in assets under management and a comprehensive line of investment solutions, we are one of Canada's leading asset management companies. Our journey began with one client and one advisor working together, and though we've grown, we remain committed to the same belief, advice matters. When we work together with advisors and investors, we can achieve better financial outcomes.

To find out more about how the Mackenzie US Mid Cap Opportunities Fund can help you achieve your financial goals, call your investment advisor today.

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