

Mackenzie Global Quantitative Equity Team



Team philosophy & approach

The Mackenzie Global Quantitative Equity Team believes in a core style of investing that employs fundamental ideas in a disciplined, risk-aware manner in seeking to generate alpha within emerging markets. The portfolio management team uses several of the same elements that a fundamental portfolio manager uses, but utilizes a systematic process to analyze more factors and stocks than a fundamental manager.

Funds under management: \$2.48 Billion*

MUTUAL FUNDS

Global Equity

- Mackenzie Emerging Markets Fund
- Mackenzie Emerging Markets Class
- Mackenzie Global Equity Fund



Team competitive advantage

Risk management/downside protection:

Mackenzie Global Quantitative Equity Team's quantitative process harnesses computing power to analyze a broad range of stocks across a multitude of the same factors a fundamental investment manager would use. This is critically important when evaluating a universe of emerging and frontier markets that consists of more than 5,000 stocks across 30 countries with different monetary policies and currencies. This approach provides investors with a consistent portfolio structure in gaining the exposures they seek to obtain.

Core focus:

The investment team constructs portfolios with a "core" focus, which aims to provide a balance between growth and value characteristics and seeks to outperform in various market environments.

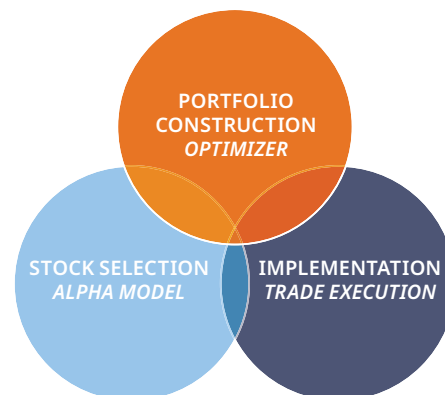
Daily stock forecasting and trading:

A quantitative approach allows the investment team to be nimble and incorporate daily changes in stock alpha forecasts for the entire investment universe, which allows the team to rapidly and efficiently trade in and out of stocks.

Strong implementation & effective trading:

In order to deliver alpha efficiently, the team has constructed a sophisticated market impact cost model, which is used in conjunction with the alpha model, as part of the investment process. The model helps the team quantify the trading impact of each security by measuring round-trip transaction costs (market impact, commissions and stamp duties).

Key investment process components



*In retail and institutional assets under management, as of November 30, 2020.

Mackenzie Global Quantitative Equity Team

Portfolio managers



Arup Datta, MBA, CFA
Senior Vice President,
Team Lead
Investment experience since 1992

Led by Arup Datta, who is a quantitative equity veteran with 25+ years of institutional portfolio management experience. Through past experiences working together, the Mackenzie Global Quantitative Equity Team consists of investment professionals with strong academic pedigrees and quantitative equity institutional management experience. They are highly aligned in philosophy and process and dedicated to managing emerging markets and developed markets strategies.



Nicholas Tam, MA., CFA
Vice President,
Portfolio Manager
Investment experience since 2009



Denis Suvorov, MA., CFA
Vice President,
Portfolio Manager
Investment experience since 2001



Haijie Chen, PhD, CFA
Vice President, Associate
Portfolio Manager
Investment experience since 2011

Investment analysts



Noi Wong
Investment Analyst
Investment experience since 2005



Victor Li
Investment Analyst
Investment experience since 2016



Connor Lehan
Investment Analyst
Investment experience since 2017

Trading



Tony Burdin, MBA, CFA
Quantitative Trader
Investment experience since 2004



Sean Furey, CAIA
Vice President,
Investment Director
Investment experience since 2016

Investment director

For more information about the Mackenzie Global Quantitative Team, visit mackenzieinvestments.com.

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