

# Mackenzie Multi-Asset Strategies Team



## Nelson Arruda

MFin, MSc, CFA

Senior Vice President,  
Portfolio Manager,  
Team Co-lead



## Todd Mattina

PhD

Senior Vice President,  
Chief Economist,  
Team Co-lead

### • Career Experience

- **2017** Joined Mackenzie Investments
- **2012** Portfolio Manager, Head of Cross Commodities, CPP Investment Board
- **2010** Associate Portfolio Manager, CPP Investment Board
- **2008** Financial Engineer, State Street Investment Services
- **2006** Software & Financial Engineer, CicadaRisk

### • Education

- MFin in Finance, University of Toronto – Rotman School of Management
- MSc in Computer Science, University of Toronto
- CFA Charterholder

### • Career Experience

- **2020** Rejoined Mackenzie Investments
- **2018** Chief Strategist and Chief Economist, VP Portfolio Construction, IMCO
- **2016** Vice Chair, Investment Committee and Pension Committee, Queen's University (to present)
- **2014** Chief Economist and Strategist, Asset Allocation, Mackenzie Investments
- **2010** Deputy Division Chief, Senior Economist, International Monetary Fund (IMF)
- **2007** Portfolio Manager, CPP Investment Board

### • Education

- PhD in International Finance, Queen's University
- MA in Economics, University of British Columbia

## Team philosophy & beliefs

The Mackenzie Multi-Asset Strategies Team believes in the importance of delivering attractive returns without taking undue risk. Their expertise, technology and approach are similar to those found in leading, world-class pension plans. This means that risk management is present at every step of a highly disciplined investment process that fights for every basis point. To help attain repeatable results, the Team utilizes a systematic decision-making process, based on years of accumulated research and driven by sound investment insights and strong economic foundations. This assists with the identification of attractive investment opportunities and better diversification of exposures in terms of factors, assets, geographies and strategies.

## Team competitive advantage

**Significant combined pension experience** with over 25 years of experience at large Canadian public pension plans, which are known to apply very advanced asset allocation and risk management practices.

**Multi-asset investment experience** that spans the design, management and oversight of portfolios exposed to traditional (equities and bonds) and non-traditional (currencies, commodities, etc.) asset classes and strategies.

**Advanced investment expertise** that includes global tactical asset allocation, active currency management, equity factor investing, active equity management, active commodities management and the use of a broad range of derivatives.

**Deliberate risk management approach** seeks to ensure that portfolio risks are carefully calibrated, allocated and monitored to achieve desired investment results.

**Custom built proprietary technology and infrastructure**, designed for and by the Multi-Asset Strategies Team to act as an array of “radars”, allowing the Team to quickly identify and adjust to changing conditions.

## Funds under management

### Symmetry Portfolios

- Symmetry Fixed Income Portfolio
- Symmetry Conservative Income Portfolio<sup>1\*</sup>
- Symmetry Conservative Portfolio<sup>1\*</sup>
- Symmetry Balanced Portfolio<sup>1</sup>
- Symmetry Moderate Growth Portfolio<sup>1</sup>
- Symmetry Growth Portfolio<sup>1</sup>
- Symmetry Equity Portfolio Class

### ETF Portfolios

- Mackenzie Conservative Income ETF Portfolio
- Mackenzie Conservative ETF Portfolio
- Mackenzie Balanced ETF Portfolio
- Mackenzie Moderate Growth ETF Portfolio
- Mackenzie Growth ETF Portfolio

### Private Wealth Pools<sup>2</sup>

- Mackenzie Private Income Balanced Pool<sup>1</sup>
- Mackenzie Private Global Income Balanced Pool
- Mackenzie Private Global Conservative Income Balanced Pool
- Mackenzie Private Canadian Focused Equity Pool<sup>1</sup>
- Mackenzie Private US Equity Pool<sup>1</sup>
- Mackenzie Private Global Equity Pool<sup>1</sup>

### Monthly Income Portfolios

- Mackenzie Monthly Income Conservative Portfolio
- Mackenzie Monthly Income Balanced Portfolio

### Alternative Funds

- Mackenzie Multi-Strategy Absolute Return Fund<sup>3</sup>
- Mackenzie Global Macro Fund

<sup>1</sup> Available in Corporate Class.

<sup>2</sup> The Mackenzie Global Fixed Income Pool is available, but not included on this list as it is managed by the Mackenzie Fixed Income Team.

<sup>3</sup> In partnership with other Mackenzie Teams - Mackenzie Fixed Income and Mackenzie Systematic Strategies.

\* Class version closed to purchases as of September 25, 2019