Mackenzie Multi-Asset Strategies Team

Team philosophy & approach

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[1*]
- Symmetry Conservative Portfolio[1*]
- Symmetry Balanced Portfolio[1]
- Symmetry Moderate Growth Portfolio[1]
- Symmetry Growth Portfolio[1]
- 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[2]

- Mackenzie Private Income Balanced Pool[1]
- Mackenzie Private Global Income Balanced Pool
- Mackenzie Private Global Conservative Income Balanced Pool
- Mackenzie Private Canadian Focused Equity Pool[1]
- Mackenzie Private US Equity Pool[1]
- Mackenzie Private Global Equity Pool[1]

MONTHLY INCOME PORTFOLIOS[2]

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

ALTERNATIVE FUNDS

- Mackenzie Multi-Strategy Absolute Return Fund[3]
- Mackenzie Global Macro Fund

[1]Available in Corporate Class.
[2]The Mackenzie Global Fixed Income Pool is available, but not included on this list as it is managed by the Mackenzie Fixed Income Team.
[3]In partnership with other Mackenzie Teams - Mackenzie Fixed Income and Mackenzie Systematic Strategies.
[*]Class version closed to purchases as of September 25, 2019.

Mackenzie Multi-Asset Strategies Team

The Mackenzie Multi-Asset Strategies Team brings the most relevant best practices from pension investing to the management of Mackenzie's balanced, managed assets and alternative solutions.

Team co-leads

Nelson Arruda, MSc., MFin., CFA

Senior Vice President,
Portfolio Manager,
Team Co-lead

Investment experience since 2009

Todd Mattina, PhD

Senior Vice President,
Chief Economist,
Team Co-lead

Investment experience since 1995

Investment directors

Allan Seychuk, CFA

Vice President,
Senior Investment
Director

Investment experience since 1999

Daniel Arsenault, MBA, CFA, FRM

Vice President,
Senior Investment
Director, Multi-Assets

Investment experience since 2003

Portfolio managers

Andrea Hallett, CFA

Vice President,
Portfolio Manager

Investment experience since 1998

Paul Taylor, MBA, CFA

Vice President,
Portfolio Manager

Investment experience since 1985

Michael Kapler, MMF, CFA

Portfolio Manager

Investment experience since 1998

Steven Armstrong, MBA, CFA

Associate Portfolio
Manager

Investment experience since 2008

Investment analysts

Jeffrey Grabell, BMath

Assistant Vice President,
Senior Systems Analyst

Gleb Sivitsky, MFE, CFA, CAIA

Senior Investment
Analyst

Chris Hau, MFE, CFA

Senior Investment
Analyst

For more information about the Mackenzie Multi-Asset Strategies Team, visit mackenzieinvestments.com.

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