

# MACKENZIE FIXED INCOME TEAM

MACKENZIE  
TEAM PROFILES



## TEAM PHILOSOPHY & APPROACH

The Mackenzie Fixed Income Team believes that a flexible global approach to fixed income investing maximizes risk-adjusted returns. Their integrated team structure blends the investment ideas from experts covering domestic and global rates and credit markets, with the potential to generate a wider array of trade ideas and greater portfolio diversification in any strategy.



## TEAM COMPETITIVE ADVANTAGE

**Significant and diverse investment experience:** The portfolio management team consists of twenty investment professionals with varied backgrounds across fixed income asset classes and markets, supported by researchers who specialize in fundamental credit, quantitative and global macroeconomic analysis.

**Depth of research:** Fundamental credit analysis is fueled by an in-house team of analysts who value credit risks at all points of a company's debt capital structure, allowing the portfolio managers more nuanced control of credit risk, company by company, throughout the credit cycle. The team's quantitative researchers build models designed to generate alpha and systematic strategies in FX and rates that can contribute diversifying return streams and risk controls alongside the fundamentally driven positions in the portfolio.

**Flexible and tactical strategies:** Mackenzie's fixed income managers utilize great flexibility in positioning portfolios through the credit cycle, and enhanced tactical trading can capitalize on cross-market opportunities or hedge risk. The integrated team structure means best ideas can be implemented rapidly across all strategies, customized in each case for optimal return-for-risk.

**Greater opportunity set for active management:** Team integration, cross-market research and trading, and flexible investment strategies offer an enhanced ability to steer portfolios into more attractive yield and total return opportunities, and to reposition away from potential risks. The result: truly active fixed income management designed to deliver better risk adjusted returns through the market cycle.



## FUNDS UNDER MANAGEMENT: \$42.6 BILLION\*

### Mutual Funds

#### Fixed Income

- > Mackenzie Canadian Money Market Fund
- > Mackenzie USD Ultra Short Duration Income Fund
- > Mackenzie Investment Grade Floating Rate Fund
- > Mackenzie Canadian Short Term Income Fund
- > Mackenzie Canadian Bond Fund
- > Mackenzie Strategic Bond Fund
- > Mackenzie Global Tactical Investment Grade Bond Fund
- > Mackenzie Global Tactical Bond Fund\*\*
- > Mackenzie Unconstrained Fixed Income Fund
- > Mackenzie Floating Rate Income Fund
- > Mackenzie Global Credit Opportunities Fund
- > Mackenzie Credit Absolute Return Fund

#### Balanced

- > Mackenzie Income Fund
- > Mackenzie Canadian Balanced Fund
- > Mackenzie Canadian Growth Balanced Fund/Class
- > Mackenzie Cundill Canadian Balanced Fund
- > Mackenzie Ivy Canadian Balanced Fund/Class
- > Mackenzie Ivy Global Balanced Fund/Class
- > Mackenzie Strategic Income Fund/Class
- > Mackenzie Global Strategic Income Fund\*\*
- > Mackenzie Global Sustainability and Impact Balanced Fund
- > Mackenzie Multi-Strategy Absolute Return Fund

### ETFs

- > Mackenzie Canadian Short Term Fixed Income ETF (MCSB)
- > Mackenzie Core Plus Canadian Fixed Income ETF (MKB)
- > Mackenzie Core Plus Global Fixed Income ETF (MGB)
- > Mackenzie Unconstrained Bond ETF (MUB)
- > Mackenzie Floating Rate Income ETF (MFT)
- > Mackenzie Global High Yield Fixed Income ETF (MHYB)

### Private Pools

#### Fixed Income

- > Mackenzie Private Global Fixed Income Pool

#### Balanced

- > Mackenzie Private Global Conservative Income Balanced Pool
- > Mackenzie Private Income Balanced Pool/Class
- > Mackenzie Private Global Income Balanced Pool

\*In retail and institutional fixed income assets under management, as of June 30, 2019. Excludes balanced funds.

\*\*Fund is available in USD option.



**MACKENZIE**  
Investments

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## MEET THE TEAM



**Steve Locke, MBA, CFA**  
Senior Vice President, Portfolio Manager,  
Head of the Fixed Income Team  
Investment experience since 1994

Led by Steve Locke, the Fixed Income Team applies their deep expertise in analyzing securities, rates, currencies and credit quality as they invest across the global fixed-income spectrum. Team members have varied backgrounds that include institutional asset management expertise in Asia, Europe, the U.S. and Canada.

### Portfolio Managers



**Konstantin Boehmer, MBA**  
Vice President,  
Portfolio Manager,  
Global Bonds  
Investment experience  
since 2007



**Felix Wong, MBA, CFA**  
Vice President,  
Portfolio Manager  
Investment Grade Bonds  
Investment experience  
since 1987



**Movin Mokbel, MBA, CFA**  
Vice President,  
Portfolio Manager,  
Term Loans  
Investment experience  
since 1998



**Dan Cooper, CFA**  
Vice President,  
Portfolio Manager  
High Yield Bonds  
Investment experience  
since 1998

### Research



**Dustin Reid, MBA**  
Vice President,  
Chief Fixed Income Strategist  
Investment experience  
since 1997



**Caroline Chan, MBA, CFA**  
Vice President,  
Portfolio Manager  
Investment experience  
since 2002

### Trading



**Tom Jurisic**  
Vice President,  
Head Trader  
Investment experience  
since 1996

**Ian Gosse,**  
Senior Trader,  
Derivatives (1996)  
**Michelle Sherief,**  
Trader, FX / Money  
Market (1996)  
**Victor Siu,**  
Trader, Bonds (2002)

### Investment Director



**Kristi Ashcroft, CFA**  
Vice President,  
Senior Investment Director  
Investment experience  
since 1996

**Hadiza Djataou,**  
Investment Director (2002)  
**Dagmar Pagel,**  
Investment Director (1993)

### Quantitative Analysts

**Jeff Li,**  
Senior Analyst,  
Quantitative Analytics (2014)  
**Ramsey D'Silva,**  
Quantitative Analyst (2017)

### Credit Analysts

**Jon Ennis,**  
AVP, Senior Analyst (2009)  
**Ken Yip,**  
Associate Portfolio Manager (2008)  
**Colin Du,**  
Senior Investment Analyst (2015)  
**Winnie Lee,**  
Settlements Analyst (2001)  
**Henno Einola,**  
Investment Analyst,  
Credit Analytics (2016)  
**Jan Iyengar,**  
Investment Analyst,  
Credit Analytics (2016)

