



## Mackenzie Bluewater Canadian Growth Fund

# Steady growth from Canada and beyond



### Why you need conservative growth companies

In an environment of low interest rates, slower economic growth and increased uncertainty, investors are challenged to grow their savings. A fund investing in growth companies can be a great way to boost portfolio returns, but it can be risky and likely unsettling for a conservative investor. A fund that invests in stocks of high-quality and mature growth companies may offer a unique mix of stability with a strong potential for portfolio growth.

### Why Mackenzie Bluewater Canadian Growth Fund

The fund offers conservative growth potential with the best of Canada and beyond.

#### Conservative growth

The fund offers the potential to build your wealth by investing in companies that are dominant in their area of focus and have the potential to grow faster than the economy. Recognizing that an overly aggressive approach to growth can expose investors to undue risk, the team seeks stable businesses with little debt and established track records of strong profitability bringing conservative growth to a portfolio.

#### The best of Canada and beyond

The fund strives to invest in the best Canada has to offer and looks abroad to add companies within sectors that are under-represented in Canada, such as technology and health care. The fund seeks out Global companies that are growing faster than Canadian growth companies which enhances the growth and diversification potential of the fund. Diversification is the combination of investments that behave differently from each other. This can help to smooth out short-term market gyrations and provide smoother, more stable returns.



#### What is a high-quality growth company?

Growth companies are fast growing companies that seem to have a promising future – and generally grow faster than the economy.

However, not all growth companies live up to their hype, and may not always be immediately profitable.

The growth companies the team seeks tend to have a strong track record of delivering profit with high margins, allowing the fund the potential to provide steady and sustainable returns.



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### How it works



#### Focus on risk management + company research

The team's unique approach combines a top down, macro view on Canada and the global economy to identify long-term risks. This analysis aims to safeguard the portfolio by avoiding economic sectors with a high potential for structural disruption, such as replacement of fossil fuel with alternative energy. Once the team has narrowed the universe of sectors and industries, companies are then selected using bottom-up analysis, which means looking for strong financials, solid competitive advantages, and a history of increasing profitability.

**We seek high quality, profitable businesses with a tailwind to sustainable, long-term growth and purchase them at a discount to fair value.**

- Dina DeGeer, CFA, Portfolio Manager



#### Globally minded

The fund is managed by the award-winning Bluewater team - the longest tenured investment manager in the Canadian Focused Equity category. The team has the flexibility to invest up to 49% of assets in global businesses, and even when selecting Canadian companies, the team takes a global mindset by seeking businesses that derive the majority of their revenue from global operations and can benefit from growth in the global economy.

### 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 \$138 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 Bluewater Canadian Growth Fund can help you achieve your financial goals, speak to your investment advisor today.**

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