



MACKENZIE
Investments

Boutique mindset. Consultative approach. All in one place.

At Mackenzie, we help you build better portfolios by combining the advantages of multiple investment boutiques with the strength and resources of one of Canada’s largest independent asset management firms. We bring you a wide range of investment solutions for all clients in all market conditions.

Backed by Mackenzie, our boutiques have more time to do what they are best at—managing assets for optimal client outcomes.

The boutique advantage **+** the Mackenzie advantage



= optimal client outcomes

Mackenzie Boutiques

Mackenzie offers a choice of 16 investment boutiques—specialist teams that pursue distinct strategies and opportunities.

FIXED INCOME

Mackenzie Fixed Income Team

EQUITIES

Mackenzie Asia Team

Mackenzie Bluewater Team

Mackenzie Cundill Team

Mackenzie Europe Team

Mackenzie Global Equity & Income Team

Mackenzie Global Quantitative Equity Team

Mackenzie Growth Team

Mackenzie Ivy Team

Mackenzie North American Equity & Income Team

Mackenzie Resource Team

MULTI ASSET

Mackenzie Multi Asset Strategies Team

Mackenzie Portfolio Solutions Team

SUSTAINABLE

Mackenzie Betterworld Team

Mackenzie Greenchip Team

REAL ASSETS

Mackenzie Real Estate Team

Boutique specialization: Offering a diversified range of investment styles and philosophies.

Each of our 16 investment boutiques is focused on what they do best. Investment teams build and manage portfolios according to their distinct investment philosophy and process, without being constrained by a house view. Small, compact teams mean agile decision making and a collegial culture where passion and conviction can drive superior results.

The expertise and agility of boutiques, the strength and resources of Mackenzie.

Multiple boutiques offer:

- Deep expertise in distinct areas of specialization
- Disciplined investment philosophies and styles
- Focus, discipline, and quality research
- Autonomous investment decisions
- Independent, agile investment teams for nimble decision making
- Accessible portfolio managers
- Culture of integrity, passion, and commitment

Mackenzie offers:

- Financial strength and stability
- Centralized functions: technology, compliance, trading, client service, operations, marketing
- Value-added expertise—tax, estate, charitable giving
- Manager monitoring—risk, performance, style
- Portfolio construction, product design
- Distribution
- Economies of scale
- Business leadership
- Canadian “home advantage” and global reach

Breadth of solutions: All the diversification and exposure you need in one place.

Mackenzie offers a comprehensive range of funds and strategies, making it a one-stop shop for all your clients' needs in all market cycles. Choose from a wide array of managers, asset classes (traditional and alternative), investment styles, strategies, themes, and geographies. Invest in a variety of vehicles, including standalone funds, private pools, multi-asset portfolios and managed solutions, designed for the needs of institutional and retail clients. With Mackenzie, you have access to the right opportunities at the right time.

Backed by Mackenzie:

The scale and stability of a global solutions provider.

Mackenzie gives our boutiques the resources and autonomy they need to perform, backed by the size and strength investors need to feel confident in their future.

195.7 billion
AUM

1 million+
clients

175+
investment
professionals

Global
Canada, US
Europe, Asia

50+ years
investing
since 1967

As of April 30, 2023

Four reasons to choose Mackenzie for your clients.

One.

Diverse investment perspectives

Two.

Specialized investment expertise

Three.

Building blocks for portfolio construction

Four.

Performance potential in any market environment



Steve Locke
Chief Investment Officer
Fixed Income & Multi-Asset



Lesley Marks
Chief Investment Officer
Equities

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