

Growth and stability: you can have it both ways

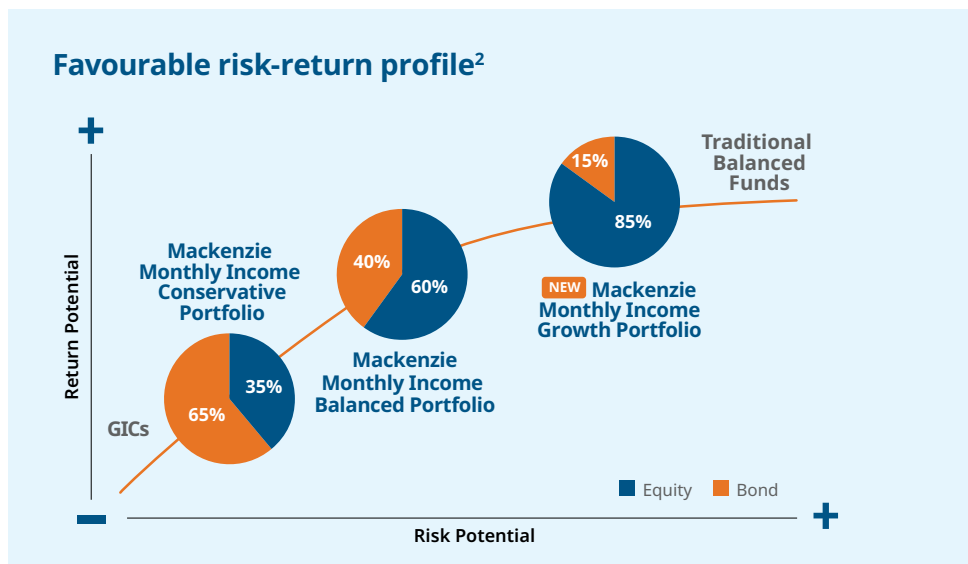


Why Mackenzie Monthly Income Portfolios

- 1 Growth** – The Portfolios are well diversified across various regions, asset classes, and investment styles to grow your investment.
- 2 Risk mitigation** – By using risk management strategies on both equity and fixed income components, our investment team aims to reduce the negative effects of severe market declines on the value of your investment to help weather your portfolio through volatility.
- 3 Cashflow** – The Monthly Income Portfolios are designed to provide a consistent cashflow and can help you meet life’s spending needs with a reliable monthly payment of 4% (annualized). The cashflow you receive comes from a diversified mix of sources that include dividends and bond interest, which is “topped up” with a return of capital when necessary, to maintain the 4% target distribution.¹

Monthly Income Portfolios at a glance

The chart illustrates how the Mackenzie Monthly Income Conservative Portfolio, Mackenzie Monthly Income Balanced Portfolio and **NEW** Mackenzie Monthly Income Growth Portfolio are generally positioned on the risk/return spectrum, compared to no-risk GICs and traditional balanced funds that offer no explicit downside mitigation. The three funds are positioned in a sweet spot that seek to offer higher growth and cash flow potential than GICs and better downside mitigation than traditional balanced funds.



Meet our team

Mackenzie Monthly Income Portfolios are managed by our Multi-Asset Strategies Team, led by Nelson Arruda and Todd Mattina. They bring extensive asset allocation and risk management experience, as well as a disciplined approach to portfolio management.



Nelson Arruda, MFin., MSc., CFA
Senior Vice-President,
Portfolio Manager, Team Co-Lead
Mackenzie Multi-Asset Strategies Team
Investment experience since 2009



Todd Mattina, PhD
Senior Vice President, Chief Economist,
Portfolio Manager, Team Co-lead
Mackenzie Multi-Asset Strategies Team
Investment experience since 2002

Series	Prefix	NEW Mackenzie Monthly Income Growth Portfolio	Mackenzie Monthly Income Balanced Portfolio	Mackenzie Monthly Income Conservative Portfolio
		FE	FE	FE
A	MFC	9276	4777	4788
F	MFC	9281	4781	4792
PW	MFC	9285	6512	6518

Why 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 \$201.7 billion in assets under management³ 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 learn how Mackenzie Monthly Income Portfolios can help you achieve your financial goals, call your financial advisor today or [click here](#) to visit our website.

1 On an annual basis, distributions will be composed of income, dividends, capital gains and return of capital. The payment of distributions is not guaranteed and may fluctuate. The payment of distributions should not be confused with a fund's performance, rate of return or yield. If distributions paid by the fund are greater than the performance of the fund, your original investment will shrink. Distributions paid as a result of capital gains realized by a fund, and income and dividends earned by a fund, are taxable in your hands in the year they are paid. Your adjusted cost base will be reduced by the amount of any returns of capital. If your adjusted cost base goes below zero, you will have to pay capital gains tax on the amount below zero.

2 Unlike mutual funds, the returns and principal of GICs are guaranteed.

3 As of June 30, 2021.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. The content of this collateral (including facts, views, opinions, recommendations, descriptions of or references to, products or securities) is not to be used or construed as investment advice, as an offer to sell or the solicitation of an offer to buy, or an endorsement, recommendation or sponsorship of any entity or security cited. Although we endeavour to ensure its accuracy and completeness, we assume no responsibility for any reliance upon it.