

BMO ETF Portfolios & US Dollar ETF Portfolios Toolkit

**Resources & Tools
for Advisors**

**Resources & Tools
for your Clients**

*If you have any issues with the file links, please update your version of Adobe Reader.

Resources & Tools for Advisors

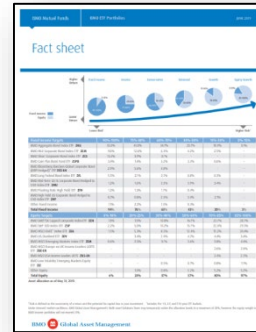
BMO ETF Portfolio Quarterly Update



BMO Actively Managed ETF Solutions – F series



ETF Portfolios Fact Sheet



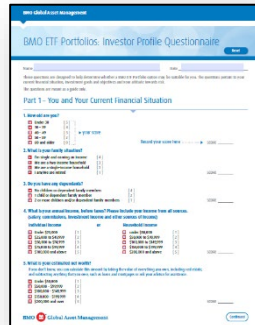
BMO ETF Portfolios & BMO US Dollar ETF Portfolios Presentation



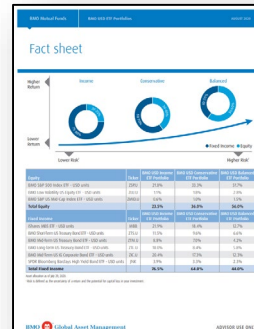
Monthly ETF Portfolios Commentary



BMO ETF Portfolios: Investor Profile Questionnaire



USD ETF Portfolios Portfolio Fact Sheet

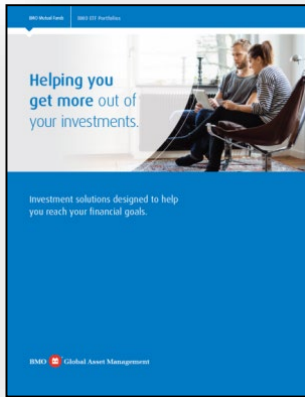


Main Page

[BMO GAM MAST Commentary Website](#)

Resources & Tools for your clients

BMO ETF Portfolio Brochure



BMO GAM 5 Lenses Strategy

BMO's "Five Lenses" Strategy

BMO Multi-Asset Solutions Team

BMO's Multi-Asset Solutions Team believes that there are five lenses to view the world through. Each lens represents a different asset class or investment strategy. By combining these five lenses, we can create a diversified portfolio that is designed to meet your long-term goals.

Lens 1	Lens 2	Lens 3	Lens 4	Lens 5
Global Equities	Global Fixed Income	Global Alternatives	Global Real Estate	Global Commodities
Key Influences: - Global - Growth - Innovation	Key Influences: - Global - Income - Stability	Key Influences: - Global - Diversification - Risk Management	Key Influences: - Global - Real Estate - Income	Key Influences: - Global - Commodities - Inflation

The five lenses strategy is a globally diversified 50/40/10/10/10 portfolio. It is designed to provide long-term growth and income. The portfolio is managed by BMO's Multi-Asset Solutions Team, which is led by the Chief Investment Officer, Global Multi-Asset Solutions.

Benefits of Asset Allocation

Benefits of Asset Allocation

Diversification through asset classes: By investing in only one asset class you may miss out on potential gains.

Global Equities: 2000-2018: 10.5% CAGR
Global Fixed Income: 2000-2018: 4.5% CAGR
Global Alternatives: 2000-2018: 8.5% CAGR
Global Real Estate: 2000-2018: 6.5% CAGR
Global Commodities: 2000-2018: 5.5% CAGR

BMO Global Asset Management

Downside Protection Portfolio Pieces

BMO Fixed Income ETF Portfolio

BMO Income ETF Portfolio

BMO Conservative ETF Portfolio

BMO Balanced ETF Portfolio

BMO Growth ETF Portfolio

BMO Equity Growth ETF Portfolio

Client Fund Facts

FUND FACTS

BMO Income ETF Portfolio Series A May 8, 2018

Manager: BMO Investments Inc.

Quick Facts: Inception: 02/20/10, Assets: \$1,234,567,890, Net Assets: \$1,234,567,890, Expense Ratio: 0.50%

Investment Objectives: The fund seeks to provide long-term capital appreciation and income. It invests in a diversified portfolio of global equities, fixed income, and alternatives.

Asset Allocation: Global Equities 40%, Global Fixed Income 40%, Global Alternatives 10%, Global Real Estate 10%, Global Commodities 10%

Top Holdings: Apple Inc., Microsoft Corp., Amazon.com Inc., Google Inc., Facebook Inc.

Annual Compound Return: 10.5% (2000-2018)

BMO Global Asset Management

Fund Profiles

BMO Balanced ETF Portfolio - Series F

Reasons to Invest in the Fund

Global Diversification: The fund invests in a diversified portfolio of global equities, fixed income, and alternatives.

Long-Term Growth: The fund has a long track record of providing long-term capital appreciation and income.

Low Volatility: The fund's diversified portfolio helps to reduce risk and volatility.

Global Exposure: The fund provides exposure to global markets, including emerging markets.

Asset Allocation: Global Equities 30%, Global Fixed Income 40%, Global Alternatives 10%, Global Real Estate 10%, Global Commodities 10%

Top Holdings: Apple Inc., Microsoft Corp., Amazon.com Inc., Google Inc., Facebook Inc.

Annual Compound Return: 8.5% (2000-2018)

BMO Global Asset Management

Factor Investing: Deep Dive into Lens 5

Factor Investing: Pension-Style Investing in your Portfolio

Investment Objectives: The fund seeks to provide long-term capital appreciation and income. It invests in a diversified portfolio of global equities, fixed income, and alternatives.

Factor Investing: The fund uses a factor-based investment strategy to identify and invest in companies with strong growth potential.

Global Exposure: The fund provides exposure to global markets, including emerging markets.

Low Volatility: The fund's diversified portfolio helps to reduce risk and volatility.

Annual Compound Return: 10.5% (2000-2018)

BMO Global Asset Management

Main Page