

# BMO Focused North American Equity Fund



## BMO Focused North American Equity Fund

**Unconstrained, high conviction Canadian solutions**

Tactical equity solutions that are designed to gain access to the relative strength analysis expertise of SIA Wealth Management in a high conviction, unconstrained portfolio of 15+ equities.

**True Tactical™ Truly tactical sleeve that fully automates your asset allocation**

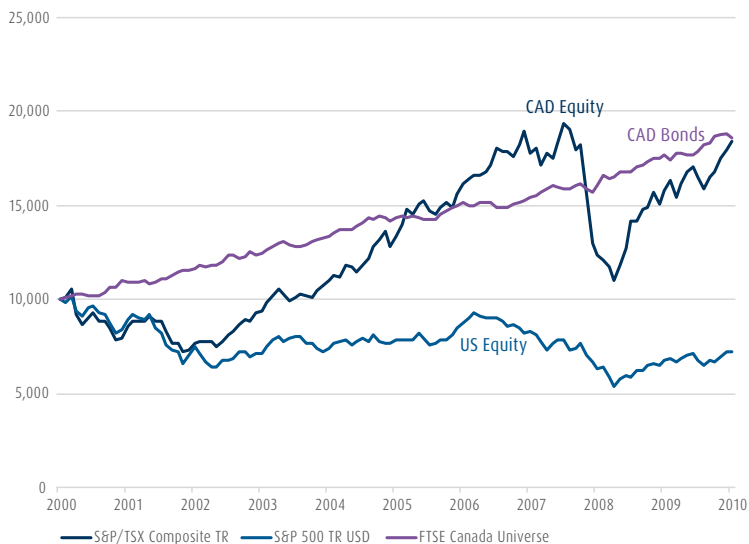


**Change**  
*is inevitable,*  
*make sure your*

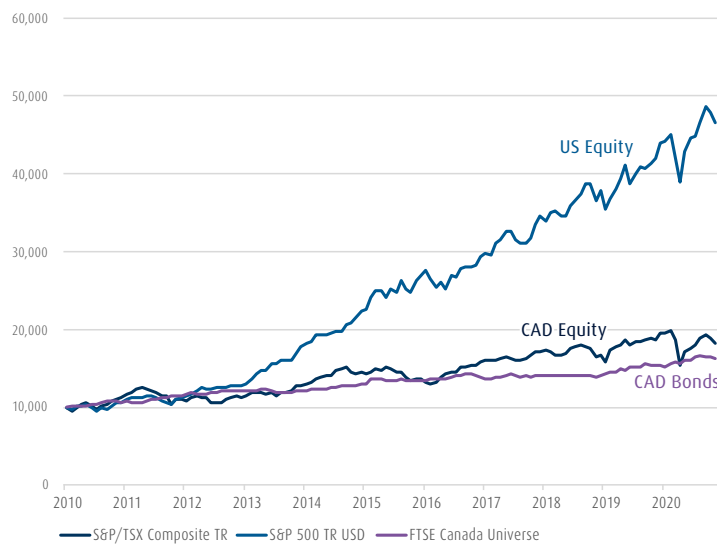
*portfolio is **tactical.***

**Example of Index Returns that demonstrate shifts in comparative performance which Tactical Investing attempts to capture in selective asset rotation.**

2000 - 2010



2010 - 2020

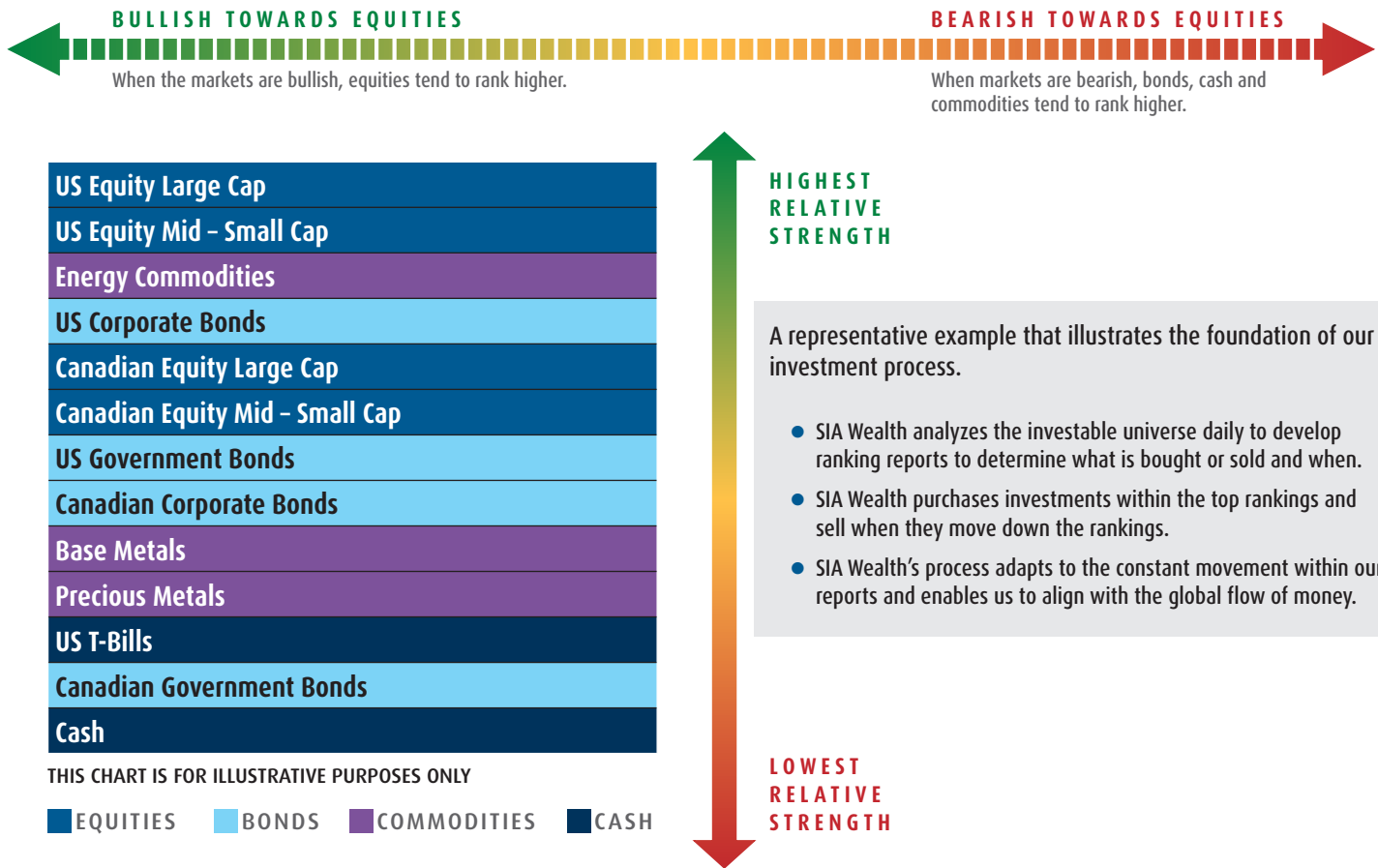


Source: Bloomberg Nov 30 2020.

Past performance should not be seen as an indication of future performance. Charts are provided for illustrative purposes only. Index performance is provided as a benchmark but is not illustrative of any particular investment. You cannot invest directly in an index.

BMO FOCUSED NORTH AMERICAN EQUITY FUND

# INVESTMENT PROCESS

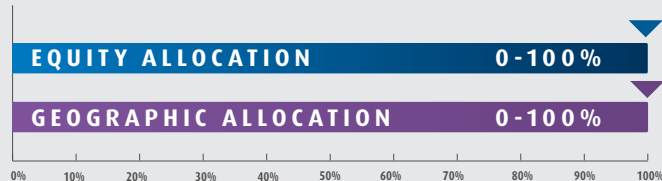


TACTICAL GLOBAL EQUITY MANDATE

# FUND PARAMETERS



RANGE OF FLEXIBILITY



MEDIUM RISK<sup>1</sup>



EXPOSURE TO:

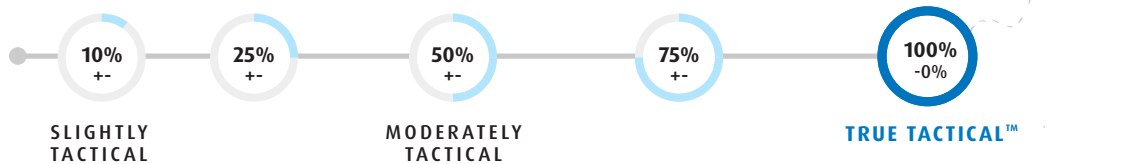
- ▶ CAD & US individual securities
- ▶ CAD & US fixed income



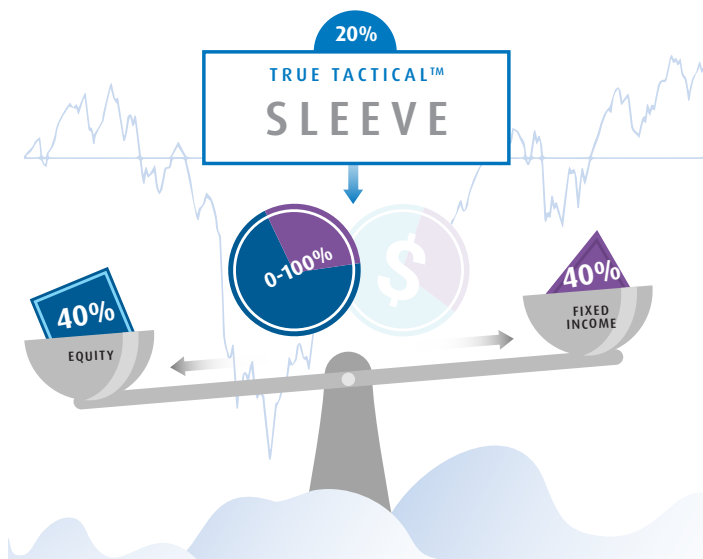
Our **TRUE TACTICAL™** approach is designed to **GROW AND SAFEGUARD WEALTH**

*BMO Global Asset Management is proud to partner with SIA Wealth, a Canadian independent investment management firm that helps investors grow and safeguard their wealth through financial technology.*

## WHAT IS YOUR TACTICAL RANGE?



Make sure your portfolio is tactical by adding a **TRUE TACTICAL™** sleeve.



► **Benefit from Automated Tactical**

**Asset Allocation** – the ability to reduce equity exposure without having to sell positions in your portfolio

### BMO Global Asset Management

### SIA Wealth Management Inc.

Series	MER (%)**	Front End †	Low Load‡
ETF	0.90	ZFN	
F Series	0.80	BM095258 / BM040258 (\$US)	
Advisor Series	1.97	BM099258 / BM079258 (\$US)	BM098258 / BM078258 (\$US)
A Series	1.95	BM070258	

\*Management Expense Ratio (MER) as at September 30, 2019. † Sales Charge ‡ Low Load purchase option is no longer available for sale.



<sup>1</sup> Risk is defined as the uncertainty of a return and the potential for capital loss in your investment.

The information contained herein is not, and should not be construed as, investment, tax or legal advice to any party. Investments should be evaluated relative to the individual’s investment objectives and professional advice should be obtained with respect to any circumstance.

Commissions, management fees and expenses (if applicable) may be associated with investments in mutual funds and exchange traded funds (ETFs). Trailing commissions may be associated with investments in mutual funds. Please read the fund facts, ETF Facts or prospectus before investing. Mutual funds and ETFs are not guaranteed, their values change frequently and past performance may not be repeated.

For a summary of the risks of an investment in BMO Mutual Funds or BMO ETFs, please see the specific risks set out in the prospectus of the relevant mutual fund or ETF. BMO ETFs trade like stocks, fluctuate in market value and may trade at a discount to their net asset value, which may increase the risk of loss. Distributions are not guaranteed and are subject to change and/or elimination.

BMO Mutual Funds are offered by BMO Investments Inc., a financial services firm and separate entity from Bank of Montreal. BMO ETFs are managed and administered by BMO Asset Management Inc., an investment fund manager and portfolio manager and separate legal entity from Bank of Montreal.

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