

# Experience the **best** of BMO GAM solutions



## BMO Managed Portfolios

You choose your destination, we'll manage the journey

The BMO Managed Portfolios are a smart and convenient way to help you benefit from BMO Global Asset Management's best investment solutions. They provide the full breadth of our investment capabilities with best-in-class portfolio management from inside and outside of BMO.

**What sets them apart is their global focus, greater emphasis on alternative investments, exposure to the growth potential of small-cap stocks, and their flexibility to use convergence products.**

### What is convergence investing?



A new generation of mutual funds that provide access to sophisticated strategies previously only available to Capital Markets clients.

**BMO Managed Portfolios** offer an easy to use, customized investment solution built to **manage your investment journey** for a smoother ride to your unique investment destination.

#### Features

Actively managed portfolios that leverage the strength of BMO MAST

Precise asset class exposure, utilizing the full range of BMO ETFs and Mutual Funds

10-15% alternative investments (ie. private equity, infrastructure) with global exposure

Five risk-based portfolio options

#### Benefits

Ongoing professional management that adapts to changing market conditions

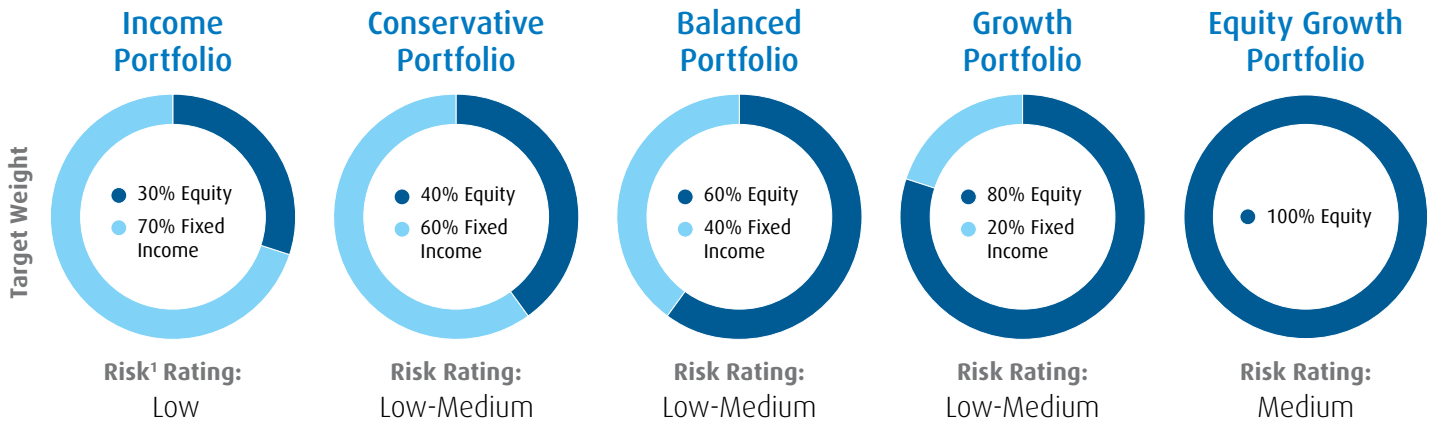
Access to the best-in-class BMO solutions

Increased diversification across asset classes to smooth out returns and increase growth potential

Maximize returns based on individual needs

Throughout BMO GAM’s evolution, we’ve purposefully built our expertise in dedicated centres of excellence where we see the best opportunities for investors. Insights and opportunities are then filtered through our BMO Multi-Asset Solutions Team, which brings the best of BMO GAM into the **BMO Managed Portfolios**.

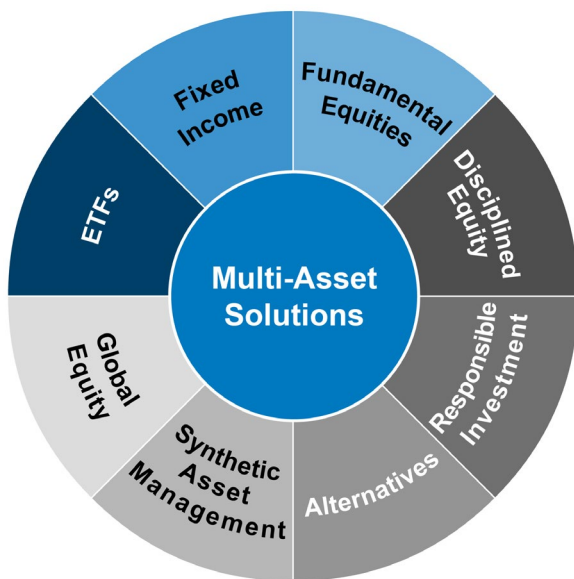
### 5 RISK-BASED INVESTMENT OPTIONS



## The BMO Multi-Asset Solutions Team

Deep and diverse investment talent of over 100 investment professionals

We provide you with a one-stop solution designed to seek the highest returns for your level of risk tolerance. Our approach is grounded in research-driven strategic and tactical asset allocation, an approach which enables us to be flexible in changing market environments. The Multi-Asset Solutions Team (MAST) works to achieve the right balance between managing risks and seizing opportunities to deliver the outcomes you’re seeking.



- ✓ 15 asset-allocators
- ✓ \$59 billion in AUM<sup>2</sup>
- ✓ 5-lenses strategic approach

[▶ Watch the \*\*MAST\*\* video or view their \*\*overview\*\*.](#)

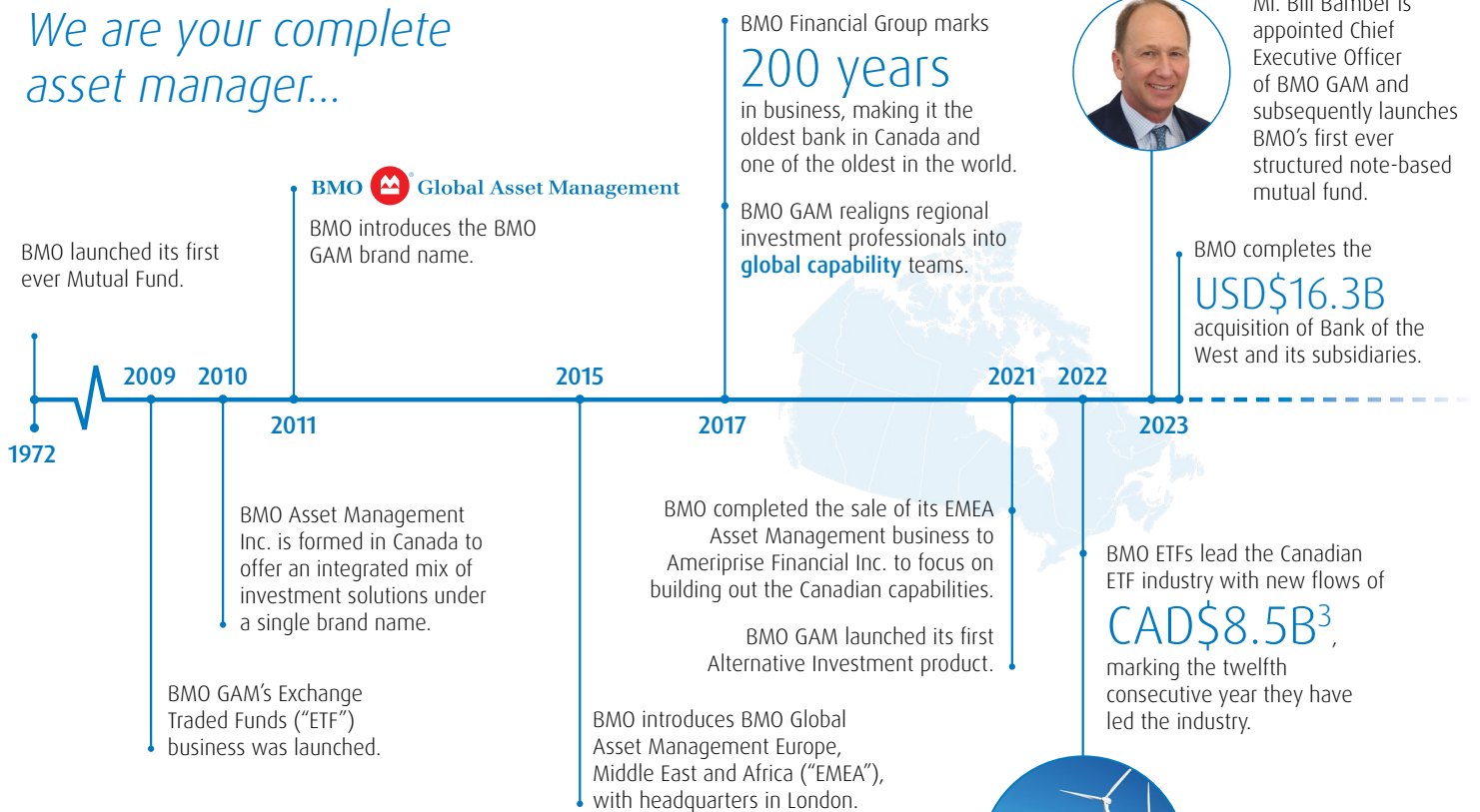
<sup>1</sup> Risk is defined as the uncertainty of a return and the potential for capital loss in your investment.

<sup>2</sup> BMO Asset Management Inc. January, 2023

## BMO GAM: We've got you covered with the right stuff

BMO GAM has evolved from solely offering mutual funds (40+ years ago!) to more sophisticated investment options like alternative investments and synthetic products. We understand that as a client, your needs are evolving too, and that's why we are proud to offer you a one-stop-solution with the best ideas across all our capabilities.

### We are your complete asset manager...



**Interested in the best?**  
 Contact your investment professional or visit [bmo.com/Mutualfunds](https://www.bmo.com/Mutualfunds) to find out how the BMO Managed Portfolios can help you confidently make real financial progress.



BMO recognized as the Top Ranked Financial Institution on New Global Sustainability Benchmark during COP 27<sup>4</sup>.

## BMO Global Asset Management

<sup>3</sup> CETFA Report, Investor Economics. December 31, 2022.

<sup>4</sup> BMO the Top Ranked Financial Institution on New Global Sustainability Benchmark Announced at COP 27, BMO Capital Markets News Release. November 22, 2022.

Any statement that necessarily depends on future events may be a forward-looking statement. Forward-looking statements are not guarantees of performance. They involve risks, uncertainties and assumptions. Although such statements are based on assumptions that are believed to be reasonable, there can be no assurance that actual results will not differ materially from expectations. Investors are cautioned not to rely unduly on any forward-looking statements. In connection with any forward-looking statements, investors should carefully consider the areas of risk described in the most recent simplified prospectus. This communication is for information purposes. The information contained herein is not, and should not be construed as, investment, tax or legal advice to any party. Particular investments and/or trading strategies should be evaluated relative to the individual's investment objectives and professional advice should be obtained with respect to any circumstance.

Commissions, trailing commissions (if applicable), management fees and expenses all may be associated with mutual fund investments. Please read the fund facts or prospectus of the relevant mutual fund before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. Distributions are not guaranteed and are subject to change and/or elimination. For a summary of the risks of an investment in BMO Mutual Funds, please see the specific risks set out in the prospectus.

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