



Helping investors adapt to
volatility
and take advantage of
opportunity

SIA Wealth's approach
to tactical investing is
designed with the ability to
adjust our equity allocation
within a wide range.

They define this flexibility as:

TRUE TACTICAL™

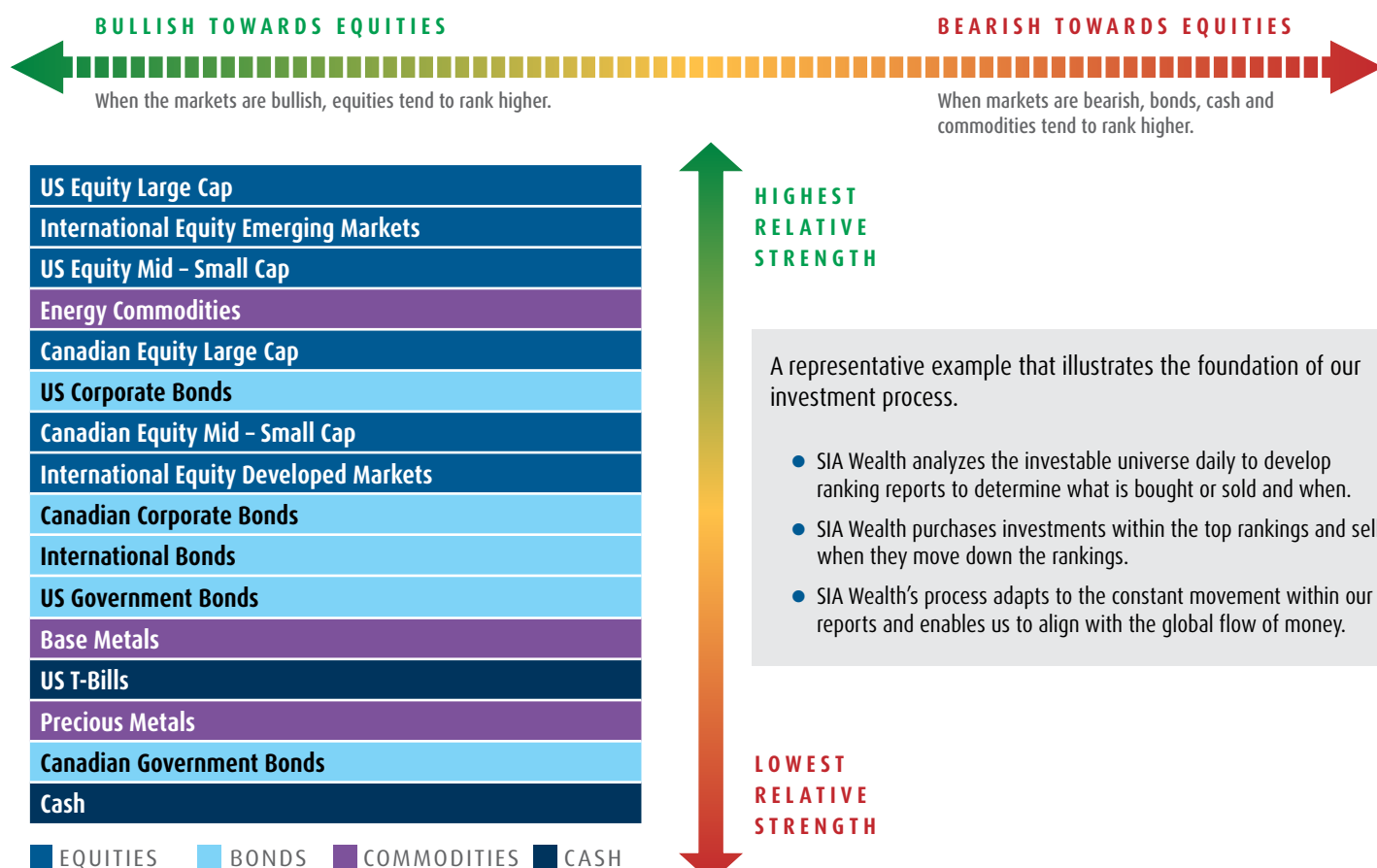
Your portfolio is your chess board.

Let **TRUE TACTICAL™** be your most tactical, powerful piece.

SIA Wealth's **TRUE TACTICAL™** process looks at over **5,000** stocks and ETFs.

On a daily basis, they analyze the relative price change of every security against every other security and rank them according to relative strength.

SIA WEALTH PROCESS



This chart is for illustrative purposes only. For more information, please see [SIACharts - What is Relative Strength?](#)



SIA's **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.

Unconstrained,
high conviction solutions

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

FUND PARAMETERS

BMO Tactical Global Equity ETF Fund

RANGE OF FLEXIBILITY

EQUITY ALLOCATION	0 - 100 %
GEOGRAPHIC ALLOCATION	0 - 100 %



LOW TO MEDIUM RISK¹



EXPOSURE TO:

- ▶ CAD, US, International equity ETFs and sector ETFs
- ▶ CAD & US individual securities
- ▶ CAD & US fixed income

BMO Tactical Global Asset Allocation ETF Fund

RANGE OF FLEXIBILITY

EQUITY ALLOCATION	0 - 60 %
GEOGRAPHIC ALLOCATION	0 - 100 %



LOW TO MEDIUM RISK¹



EXPOSURE TO:

- ▶ CAD, US, International equity ETFs and sector ETFs
- ▶ CAD & US individual securities
- ▶ CAD & US fixed income

BMO SIA Focused Canadian Equity Fund

RANGE OF FLEXIBILITY

EQUITY ALLOCATION	0 - 100 %
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MEDIUM RISK¹



EXPOSURE TO:

- ▶ CAD individual securities
- ▶ CAD fixed income

BMO SIA Focused North American Equity Fund

RANGE OF FLEXIBILITY

EQUITY ALLOCATION	0 - 100 %
GEOGRAPHIC ALLOCATION	0 - 100 %



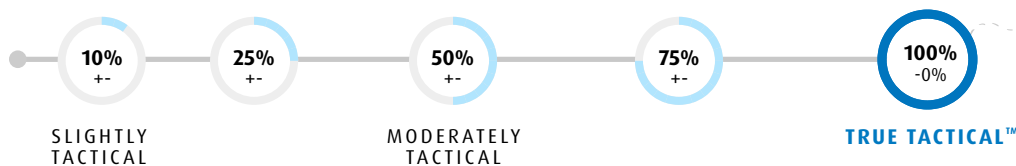
LOW TO MEDIUM RISK¹



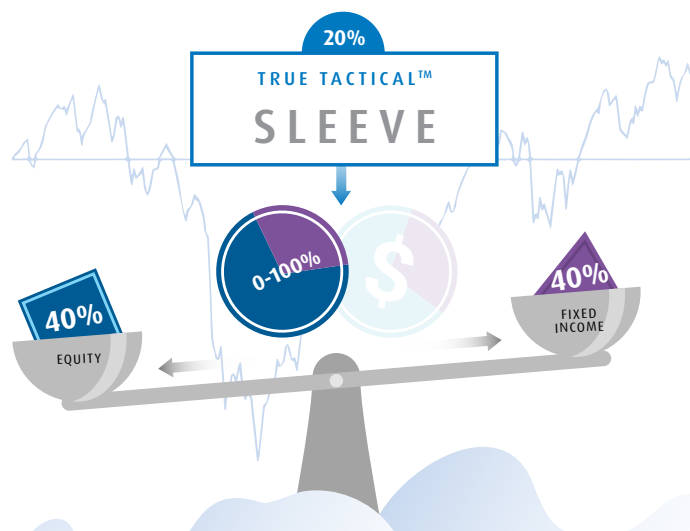
EXPOSURE TO:

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

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
- **Complementary strategy** to existing long-only equity managers

BMO Global Asset Management

The four funds listed below are sub-advised by SIA Wealth Management Inc.

SIA Wealth Management Inc.

Fund Name	Advisor Series FE/LL	Series F	ETF	Advisor Series MER (%)	Series F MER (%)	ETF MER (%)
BMO SIA Focused Canadian Equity Fund	BM099257	BM095257	ZFC	1.88	0.83	0.83
BMO SIA Focused North American Equity Fund	BM099258 BM079258 [SUS]	BM095258 BM040258 [SUS]	ZFN	1.88	0.81	0.83
BMO Tactical Global Equity ETF Fund	BM099217 BM079217 [SUS]	BM095217 BM040217 [SUS]	-	1.90	0.91	-
BMO Tactical Global Asset Allocation ETF Fund	BM099763 BM079763 [SUS]	BM095763 BM040763 [SUS]	-	1.72	0.73	-

*Management Expense Ratio (MER) as at September 30, 2024.



¹ All investments involve risk. The value of a Mutual Fund can go down as well as up and you could lose money. The risk of a Mutual Fund is rated based on the volatility of the Mutual Fund's returns using the standardized risk classification methodology mandated by the Canadian Securities Administrators. Historical volatility doesn't tell you how volatile a Mutual Fund will be in the future. A Mutual Fund with a risk rating of "low" can still lose money. For more information about the risk rating and specific risks that can affect a Mutual Fund's returns, see the BMO Mutual Fund's simplified prospectus.

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) all may be associated with investments in mutual funds. Trailing commissions may be associated with investments in certain series of securities of mutual funds. Please read the fund facts, ETF facts or simplified 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 the BMO Mutual Funds, please see the specific risks set out in the simplified prospectus. ETF Series of the BMO Mutual Funds 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 managed by BMO Investments Inc., which is an investment fund manager and a separate legal entity from Bank of Montreal.

BMO Global Asset Management is a brand name under which BMO Asset Management Inc. and BMO Investments Inc. operate.

"BMO (M-bar roundel symbol)" is a registered trademark of Bank of Montreal, used under licence.