



## Mackenzie Bluewater Global Growth Balanced Fund

# Balance stability and global opportunity



### Why seek growth from a global balanced fund?

In an environment of low interest rates and slower economic growth, many investors are searching for ways to grow their savings but are cautious of taking on additional risk. A global balanced portfolio of high-quality growth companies, as well as bonds, can bring a unique mix of stability and strong growth potential. Growth and stability are often seen as mutually exclusive, but a prudently managed balanced fund with global reach may provide the returns investors seek, without undue risk.

### Why Mackenzie Bluewater Global Growth Balanced Fund

Mackenzie Bluewater Global Growth Balanced Fund aims to strike a balance between growing and protecting your savings.

#### 1 Sustainable growth.

The fund offers the potential to build your wealth by investing in growth companies. Growth companies are typically faster growing companies that seem to have a promising future and generally grow quicker than the economy. However, not all growth companies live up to their hype and may not always be immediately profitable. The growth companies the portfolio managers seek tend to have strong track records of delivering profits with high margins, allowing the fund the potential to provide steady and sustainable returns.

#### 2 Diversification

The fund's fixed income component – between 30% and 40% of the portfolio – aims to enhance returns opportunistically and help mitigate volatility by stabilizing returns in times of market stress. As a global fund, the portfolio is well-diversified across the world.



#### Diversification matters

Considered a key element to successful investing, diversification is the combination of investments that behave differently from each other, such as stocks and bonds. Traditionally, when stocks decline, bonds tend to hold their value or may rise.



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Investments

## Mackenzie Bluewater Global Growth Balanced Fund



Canada only makes up  
**3.1%**  
of the global market



By further diversifying globally, Canadian investors can enhance the benefits of diversification and gain access to some of the world's best investment opportunities and sectors that Canada lacks.

Source: Morningstar Direct, as of October 31, 2020. \*Global market as represented by MSCI World Index (Net-C\$).

## How it works

### Blend of expert award-winning teams

The fund is managed by a unique combination of three teams that bring deep expertise to bear. The Mackenzie Bluewater Team manages a concentrated basket of 30-35 high conviction investments with a view to long-term growth. The Mackenzie Fixed Income team designs a complementary bond portfolio with a view to offsetting some of the equity risk and aims to create stability and potential for excess return in the fund. The overall allocation of assets between equities and fixed income is directed by the Mackenzie Multi-Asset Strategies Team, based on their long-term investment views.

### Risk management + company research

The equity team's unique approach incorporates a top down, macro view on the global economy to identify long-term risks. This analysis aims to safeguard the portfolio by avoiding economic sectors with a high potential for structural disruption, such as the replacement of fossil fuel with alternative energy. Once the team has narrowed the universe of sectors and industries, companies are selected using bottom-up analysis, which means looking for strong financials, solid competitive advantages and a history of increasing profitability.

**We seek high quality, profitable businesses with a tailwind to sustainable, long-term growth and purchase them at a discount to fair value.**

– David Arpin, Portfolio Manager

## Why invest with 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 over \$138 billion in assets under management 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 find out more about how the Mackenzie Bluewater Global Growth Balanced Fund can help you achieve your financial goals, speak to your investment advisor today.**

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