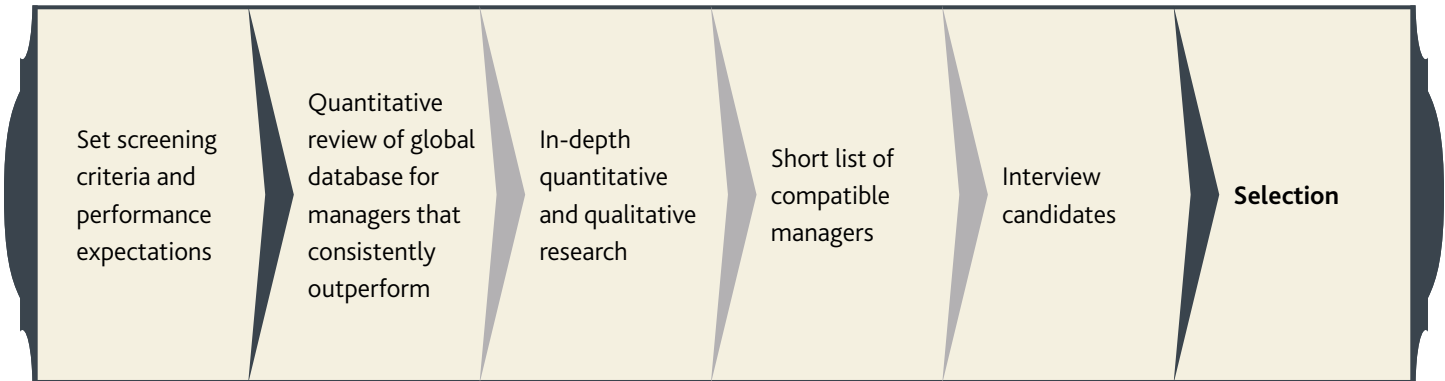
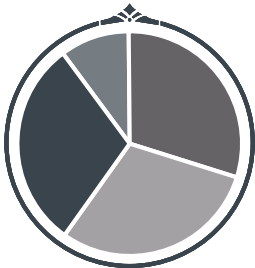


## How we select institutional managers in our portfolios



## Institutional Asset Class Portfolios

The building blocks of our four core Marquis Institutional Portfolios. They can be used as stand-alone investments or combined to create personalized solutions.



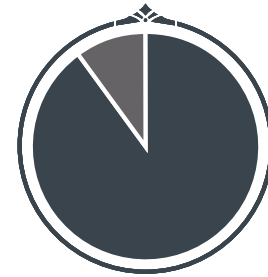
**Canadian Equity**

Four Canadian equity managers:  
30% GARP<sup>1</sup>, 30% Equity income,  
30% Growth and 10% Small cap GARP



**Global Equity**

Value, Growth and GARP managers:  
30% US equities, 20% international  
equities, and 50% global equities



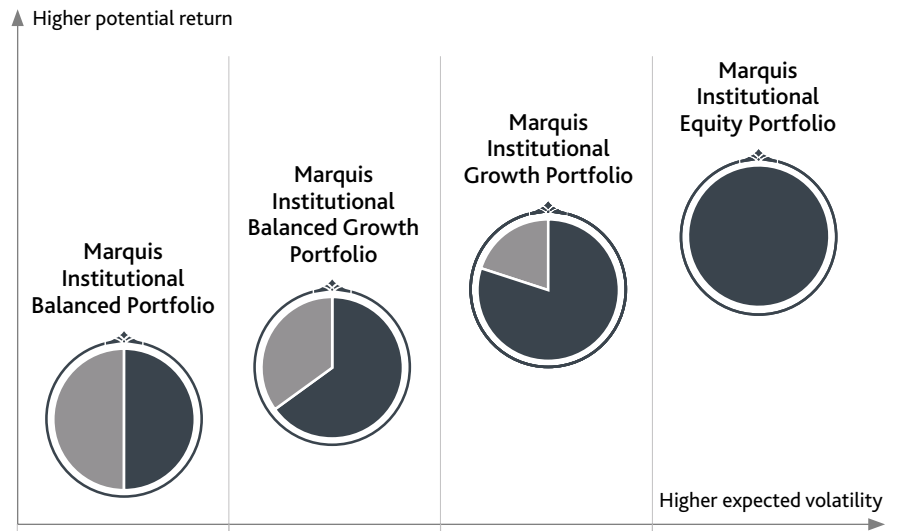
**Bond**

One Canadian and one  
global manager with a  
diversified core approach

### Stringent Monitoring and Rebalancing

Marquis Institutional Portfolios are overseen by Dynamic's Portfolio Solutions Oversight Committee. This highly experienced group of investment professionals, supported by a qualified team of analysts reviews the portfolios quarterly to ensure they are meeting expectations. The portfolios are also regularly monitored and rebalanced to ensure a consistent strategy over time.

<sup>1</sup> Growth at a reasonable price



Component	Manager	Balanced 50% bonds 50% equities	Balanced Growth 35% bonds 65% equities	Growth 20% bonds 80% equities	Equity 100% equities	
Bond	1832 Asset Management L.P.					
	Payden & Rygel Investment Management	50%	35%	20%	N/A	
Canadian Equity	Jarislowsky Fraser Limited					
	1832 Asset Management L.P.	15%	20%	25%	30%	
	Hillsdale Investment Management Inc					
Global Equity	United States	Fiduciary Management, Inc.	10.5%	13.5%	16.5%	21%
		1832 Asset Management L.P.				
	International	Walter Scott & Partners Ltd.	7%	9%	11%	14%
	Global	Epoch Investment Partners				
Baillie Gifford Overseas Limited		17.5%	22.5%	27.5%	35%	

[dynamic.ca/marquis](https://dynamic.ca/marquis)

Researched by Dynamic Funds®

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