



DYNAMIC
LIVE
IN CONVERSATION

Dynamic Funds[®]
Invest with advice.



Investing in Companies with Quality Growth

Vishal Patel, B.Comm. (Hons.), CFA
Vice President & Senior Portfolio Manager

Our Investment Philosophy



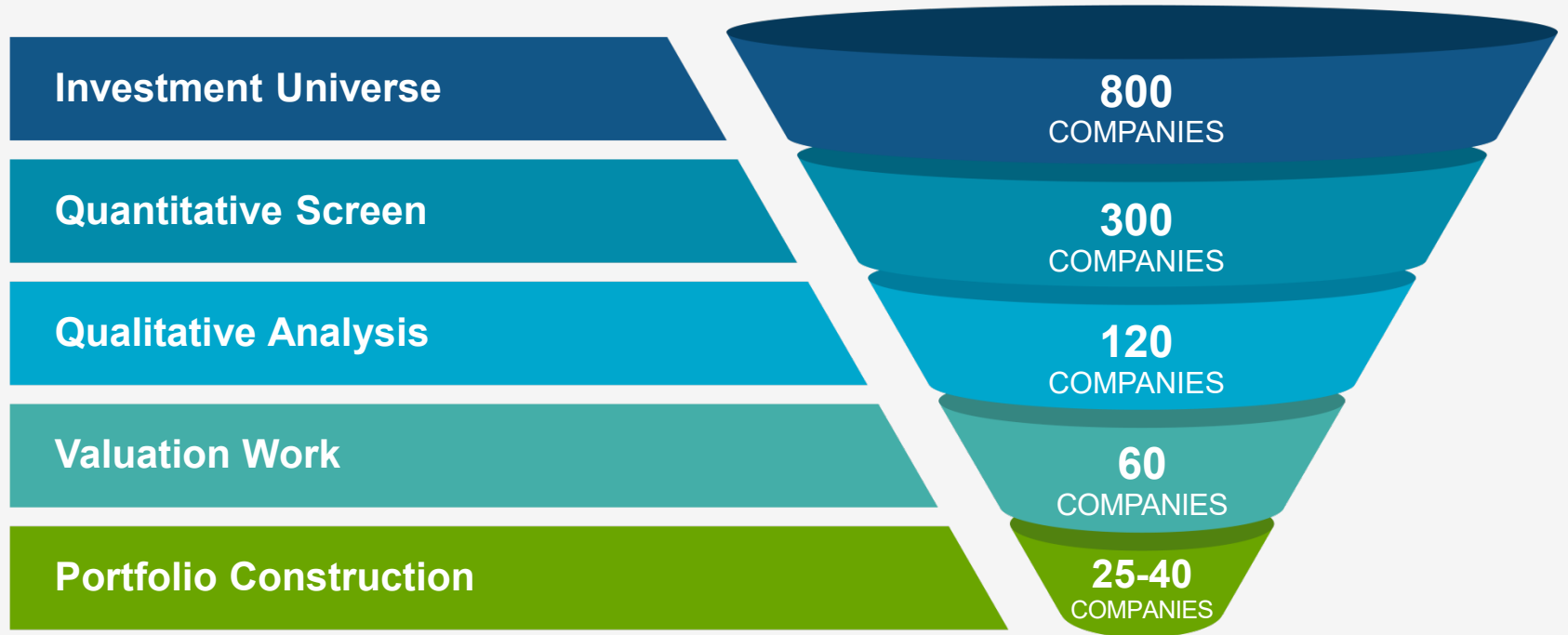
ALIGNMENT



PARTNERSHIP

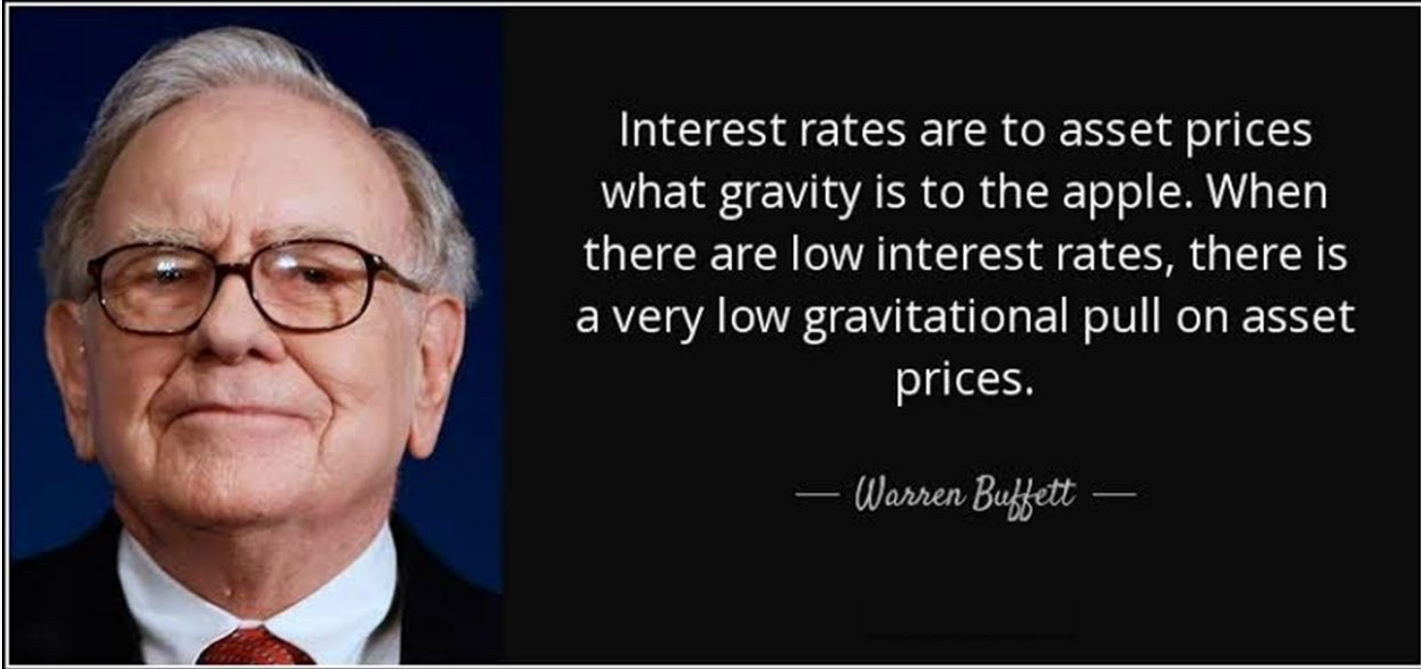
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Our Investment Process Defined, Repeatable, Focused



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Interest Rates Are Like Gravity



Areas of Opportunity

Focus	Less-focus
Information Technology	Real Estate
Communication Services	Utilities
Consumer Staples	Materials
Consumer Discretionary	
Energy	
Health Care	
Financials	
Industrials	



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Qualitative Analysis

Examples of on the Ground Due Diligence



*Visiting in August with Ryan McInerney

Podcasts: On The MONEY with Dynamic Funds



Artificial Intelligence (AI): A Paradigm Shift For Investors

April 27, 2023

Vice President & Senior Portfolio Manager Vishal Patel shares his thoughts on the importance of Artificial Intelligence (AI), how it will impact various industries from an investment standpoint, and how this technology will impact how we work and play.

The Benefits of Co-Investing with Company Founders and Entrepreneurs

December 3, 2020

Vice President & Senior Portfolio Manager Vishal Patel provides insights on the benefits of co-investing in founder and entrepreneur led businesses and the attributes he looks for when identifying the next great founder or entrepreneur. He also discussed where he expects to find opportunities as the global economy recovers.

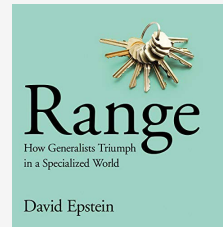
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Lessons Learned From Charlie Munger (1924 – 2023)

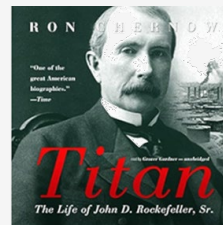


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Generalist



Biographies

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