



Team philosophy & beliefs

The Mackenzie Multi-Asset Strategies Team believes in the importance of delivering attractive returns without taking undue risk. Their expertise, technology and approach are similar to those found in leading, world-class pension plans. This means that risk management is present at every step of a highly disciplined investment process that fights for every basis point. To help attain repeatable results, the Team utilizes a systematic decision-making process, based on years of accumulated research and driven by sound investment insights and strong economic foundations. This assists with the identification of attractive investment opportunities and better diversification of exposures in terms of factors, assets, geographies and strategies.



Competitive advantage

Significant combined pension experience with over 20 years of experience at Canada's largest public pension plan, which is known to apply very advanced asset allocation and risk management practices.

Multi-asset investment experience that spans the design, management and oversight of portfolios exposed to traditional (equities and bonds) and non-traditional (currencies, commodities, etc.) asset classes and strategies.

Advanced investment expertise that includes global tactical asset allocation, active currency management, factor investing, active equity management, active commodities management and the use of a broad range of derivatives.

Deliberate risk management approach seeks to ensure that portfolio risks are carefully calibrated, allocated and monitored to achieve desired investment results.

Custom built proprietary technology and infrastructure, designed for and by the Multi-Asset Strategies Team to act as an array of "radars", allowing the Team to quickly identify and adjust to changing conditions.

¹Available in Corporate Class.

²The Mackenzie Global Fixed Income Pool is available, but not included on this list as it is managed by the Mackenzie Fixed Income Team.

³In partnership with other Mackenzie Teams - Mackenzie Fixed Income and Mackenzie Systematic Strategies.

⁴Class version closed to purchases as of September 25, 2019.

Funds under management

Symmetry Portfolios

- Symmetry Fixed Income Portfolio
- Symmetry Conservative Income Portfolio^{1*}
- Symmetry Conservative Portfolio^{1**}
- Symmetry Balanced Portfolio¹
- Symmetry Moderate Growth Portfolio¹
- Symmetry Growth Portfolio¹
- Symmetry Equity Portfolio Class

ETF Portfolios

- Mackenzie Conservative Income ETF Portfolio
- Mackenzie Conservative ETF Portfolio
- Mackenzie Balanced ETF Portfolio
- Mackenzie Moderate Growth ETF Portfolio
- Mackenzie Growth ETF Portfolio

Private Wealth Pools²

- Mackenzie Private Income Balanced Pool¹
- Mackenzie Private Global Income Balanced Pool
- Mackenzie Private Global Conservative Income Balanced Pool
- Mackenzie Private Canadian Focused Equity Pool¹
- Mackenzie Private US Equity Pool¹
- Mackenzie Private Global Equity Pool¹

Monthly Income Portfolios

- Mackenzie Monthly Income Conservative Portfolio
- Mackenzie Monthly Income Balanced Portfolio

Alternative Funds

- Mackenzie Multi-Strategy Absolute Return Fund³
- Mackenzie Global Macro Fund

Mackenzie Multi-Asset Strategies Team

Mackenzie team profiles

Meet the team

The Mackenzie Multi-Asset Strategies Team brings the most relevant best practices from pension investing to the management of Mackenzie's balanced, managed assets and alternative solutions.

Portfolio Managers



Nelson Arruda, MSc., MFin., CFA
Vice President, Portfolio Manager
Investment experience since 2009



Andrea Hallett, CFA
Vice President, Portfolio Manager
Investment experience since 1998



Michael Kapler, MMF, CFA
Portfolio Manager
Investment experience since 1998



Steven Armstrong, MBA, CFA
Associate Portfolio Manager
Investment experience since 2008

Investment Analysts



Jeffrey Grabell, BMath
Assistant Vice President, Senior Systems Analyst



Gleb Sivitsky, MFE, CFA, CAIA
Senior Investment Analyst



Chris Hau, MFE, CFA
Senior Investment Analyst

Chief Economist & Strategist



Alex Bellefleur, MEd., CFA
Chief Economist & Strategist
Investment experience since 2007

Investment Director



Allan Seychuk, CFA
Vice President, Senior Investment Director
Investment experience since 1999

For more information about the Mackenzie Multi-Asset Strategies Team, visit mackenzieinvestments.com.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus of before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

1097947 AL7008 09/18