

BMO Global Asset Management's Global Equity Team: Expertise that Dives Deeper

In 2022, a Global Equity team of 14 global sector specialists joined BMO Global Asset Management to manage Global Equity mandates. The team has since grown to 15 people and counting.

The Global Equity team combines their Global sector insights (fundamental, bottom-up) with macro insights (top-down) from BMO GAM's Multi-Asset Solutions Team. Together, the Global Equity team has had notable success in delivering performance.

Discovering Gems in Every Sector

The Global Equity team employs a unique investment process that capitalizes on dedicated sector specialists. You might call it a multi-manager strategy in one—experts with top-to-bottom knowledge of various sectors (Healthcare, Technology, Financials, Energy, and more) contribute their best ideas to our regional and global portfolios. This enables the team to collaboratively identify timely trends and potential impacts to companies across sectors.



A Diverse, Award-Winning Team¹

The Global Equity team features:



A team of tenured Global sector specialists each with the power to own their best sector ideas.



Portfolio construction from the combined insights of a highly collaborative team and proprietary quantitative models.



11 CFA charterholders and 7 advanced degrees, with educational and real-world experience in diverse fields such as technology, AI, finance, data science, biotechnology, accounting, automotive, banking, and consumer industries.²

The Global Equity Team's Contribution

- Prioritizing domain expertise is the cornerstone of the Global Equity Team's approach.
- Dedicated coverage of all 11 Global Industry Classification Standards (GICS) ensures that the team's best sector ideas combine to create global and regional equity solutions that are scalable and easily re-positioned by knowledgeable experts across complete market cycles.
- Sector tilts are determined through a collaborative process combining top-down and bottom-up viewpoints.
- Fundamental inputs and insights from the global equity team help inform the BMO GAM's Multi-Asset Solutions Team (MAST) macro view.

Meet the Global Equity Team

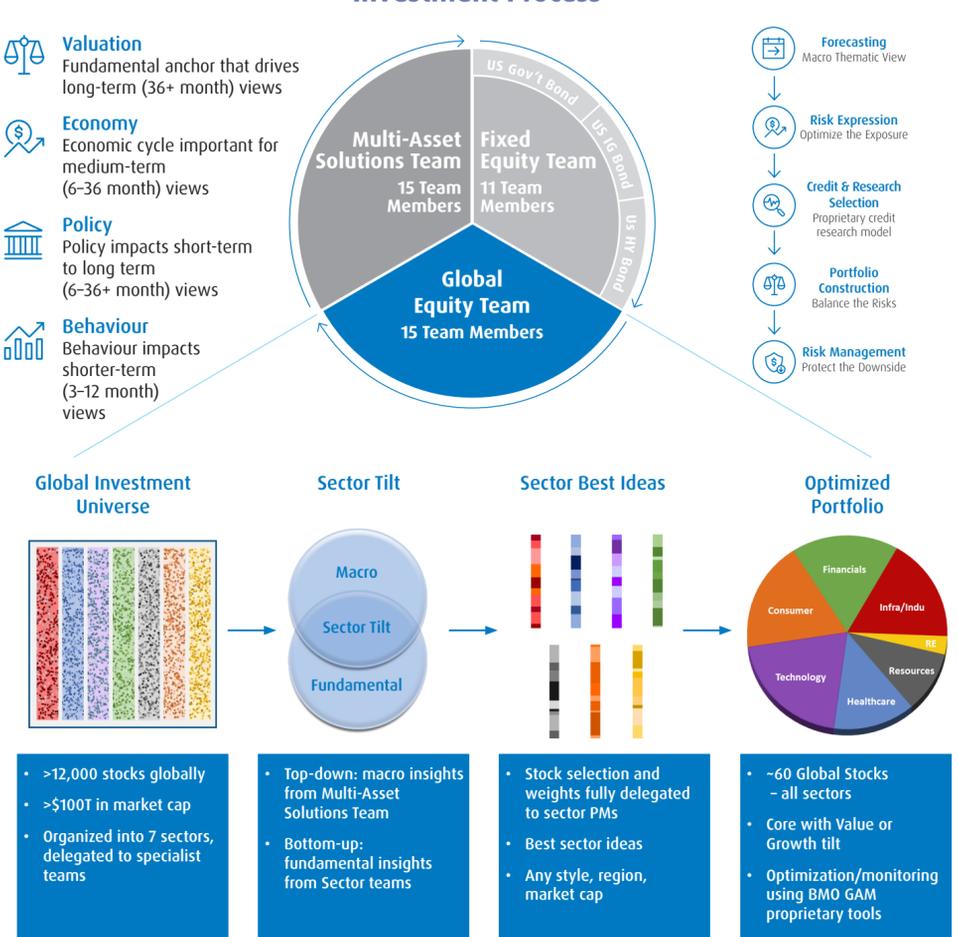


Jeff Elliott, PhD, CFA, MBA
Team Lead, Global Equities

REIT	Resources	Financials	Technology	Infrastructure	Consumer	Health Care
Kate MacDonald, CFA, MFin Portfolio Manager	Hoa Hong, CFA, MBA Portfolio Manager	John Hadwen, CFA Portfolio Manager	Malcolm White, CFA Portfolio Manager	Jeremy Yeung, CFA Portfolio Manager	Massimo Bonansinga, MBA Portfolio Manager	Ashley Bussin, CFA Senior Analyst
	Hannah Ou Analyst	Goshen Benzaquen, MBA Portfolio Manager	Adriana Buduru Analyst	Janice Wong, CFA, CPA Associate Portfolio Manager	Alex Payne, CFA Senior Analyst	Jeff Elliott, PhD, CFA, MBA Portfolio Manager
		Kyle Mendyk, CFA Associate Portfolio Manager		Alex Yang, CFA Associate Portfolio Manager		

Fund Focus: BMO Global Income & Growth Fund

Investment Process



Source: BMO GAM, for illustration purposes only.

Invests in	This fund's objective is to generate income and provide long-term capital growth by investing primarily, directly or indirectly, in equity and fixed income securities from around the world.	
Investment Process	Top-down and bottom-up; sector focus	
Monthly Distribution	Advisor: 3.0 cents, F Series: 3.8 cents	
CIFSC Category	Global Neutral Balanced	
Risk Rating	Low to Medium	
MER**	Advisor FE / US\$ FE	1.95
	Series F / US\$	0.85
	Series F6	0.85
Fund Codes	Advisor FE / US\$ FE	BM099165 / BM079165 (USD)
	Series F / US\$	BM095165 / BM040165 (USD)
	Series F6	BM036165

**Distributions are subject to change and/or elimination.

**Fund is less than one year old so MERs are targets and can change without notice.

Fund Focus: BMO Global Innovators Fund

Investment Process



Invests in	Equity and equity-related securities of global companies involved in the development of innovative products, processes or services.	
Investment Process	Top-down, thematic focus	
Typical Holdings	50 - 60	
CIFSC Category	Global Equity	
Risk Rating	Medium	
MER**	Advisor FE / US\$ FE	2.10
	Series F / US\$	0.99
	Series F6	0.99
Fund Codes	Advisor FE / US\$ FE	BM099164 / BM079164 (USD)
	Series F / US\$	BM095164 / BM040164 (USD)
	Series F6	BM036164

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BMO Global Asset Management

¹TopGun Investment Minds Platinum Class winners 2021/2022 - Platinum Class Winners, Hoa Hong, Malcolm White, Jeremy Yeung. Platinum Class awarded to individuals who have been Designated TopGun in four consecutive years. TopGun Investment Minds winner 2021/2022 - Kate MacDonald.

² As of November 30, 2022.

Disclosures:

Any statement that necessarily depends on future events may be a forward-looking statement. Forward-looking statements are not guarantees of performance. They involve risks, uncertainties and assumptions. Although such statements are based on assumptions that are believed to be reasonable, there can be no assurance that actual results will not differ materially from expectations. Investors are cautioned not to rely unduly on any forward-looking statement. In connection with its forward-looking statements, investors should carefully consider the areas of risk described in the most recent simplified prospectus. This communication is for information purposes. The information contained herein is not, and should not be construed as, investment, tax or legal advice to any party. Particular investments and/or trading strategies should be evaluated relative to the individual's investment objectives and professional advice should be obtained with respect to any circumstance.

Commissions, trailing commissions (if applicable), management fees and expenses all may be associated with mutual fund investments. Please read the fund facts or 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 BMO Mutual Funds, please see the specific risks set out in the prospectus.

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