

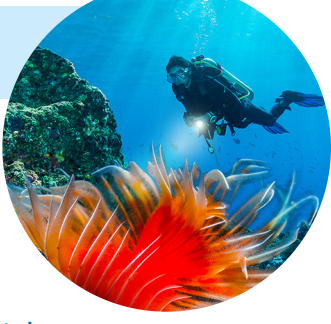
BMO Global Asset Management's Global Equity Team: Expertise that Dives Deeper

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

Kate MacDonald, CFA, MFin
Portfolio Manager

Resources

Hoa Hong, CFA, MBA
Portfolio Manager

Hannah Ou
Analyst

Financials

John Hadwen, CFA
Portfolio Manager

Goshen Benzaquen, MBA
Portfolio Manager

Kyle Mendyk, CFA
Associate
Portfolio Manager

Technology

Malcolm White, CFA
Portfolio Manager

Jeremy Yeung, CFA
Portfolio Manager

Adriana Buduru
Analyst

Infrastructure

Massimo Bonansinga, MBA
Portfolio Manager

Janice Wong, CFA, CPA
Associate
Portfolio Manager

Alex Yang, CFA
Associate
Portfolio Manager

Consumer

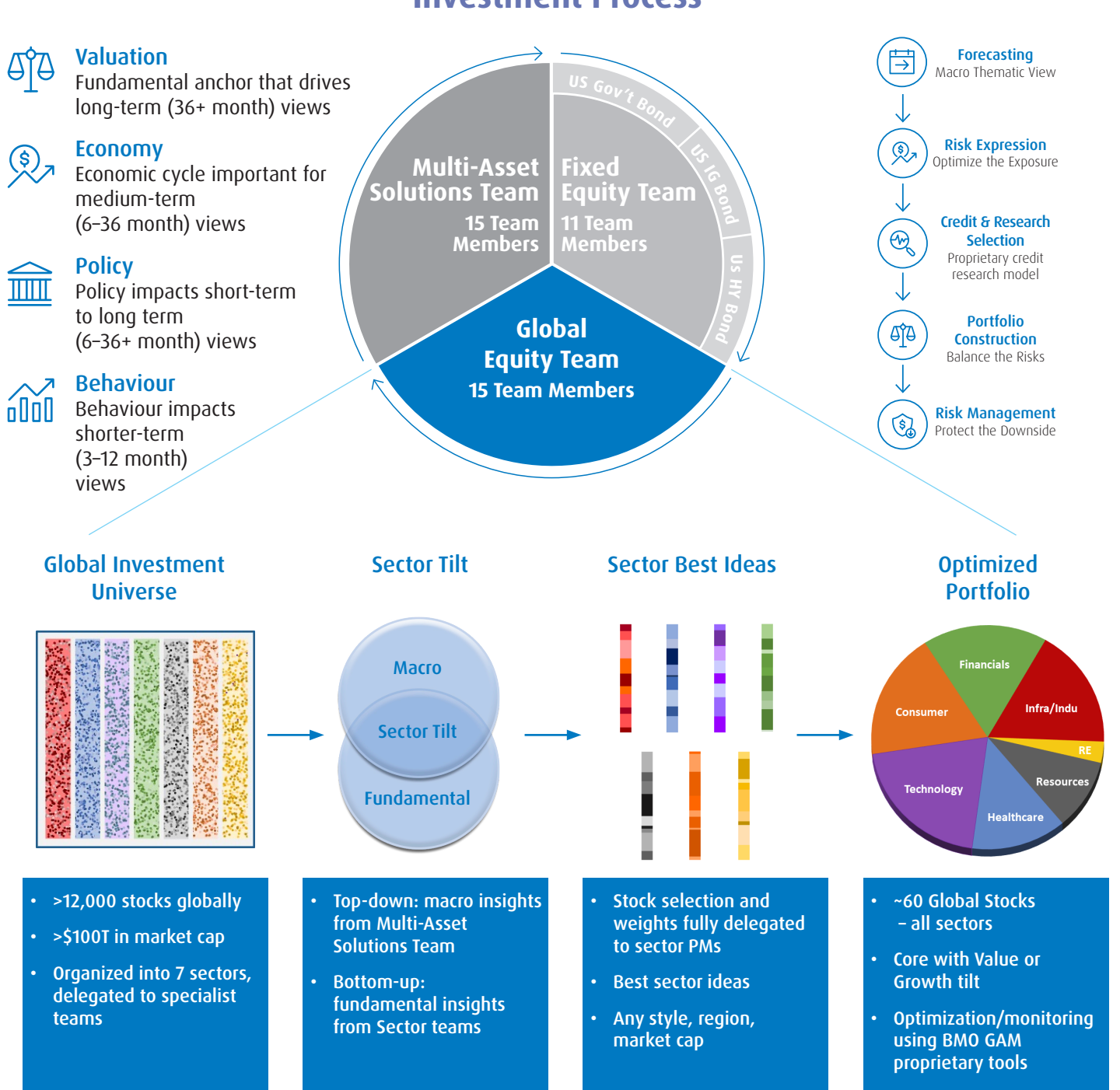
Ashley Bussin, CFA
Senior Analyst

Alex Payne, CFA
Senior Analyst

Health Care

Jeff Elliott, PhD, CFA, MBA
Portfolio Manager

Fund Focus: BMO Global Income & Growth Fund



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\$	BM095164 / 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

