

A Whole World of Opportunity Available in One Portfolio

BMO GAM Global Equity Sector Neutral Portfolio

Global equities offer the benefits of diversification, increased potential for alpha generation, and exposure to sectors, companies, and trends that may be unavailable domestically. Now, you can access our 20-person Global Equity team's best global sector ideas in a single mandate.

The BMO GAM Global Equity Sector Neutral Portfolio aims to generate **long-term returns** by investing in a basket of high conviction global equities (approx. 50–60 holdings¹). Rather than make sector bets, the portfolio will maintain benchmark-like² exposure in terms of Global Industry Classification Standard (GICS) sectors, but differentiates itself through fundamental stock selection within each sector.

The **Global Equity PM team**, composed of global sector specialists, selects companies for the portfolio based on comprehensive research and extensive knowledge of the drivers of outperformance in each sector. The PM best equipped to make a decision is granted the authority to do so—every time.

Key Features

- Global sector specialists
- Exposure to high conviction global equities
- No sector bets
- No style bias
- Regular rebalancing for sector weights
- Decentralized decision-making
- 50% maximum annual turnover

Trust That Goes a Long Way

“The way our process works is that rather than looking at the global equity universe through styles or regions, we split up the world by sectors. The key to this unique sector model is trust—you have to believe in your colleague's ability to pick stocks, adapt styles and generate alpha.”

– Jeff Elliott,
Head of Global Equity



Meet the expanded Global Equity team: <https://www.youtube.com/watch?v=inD5iCMWnRU>

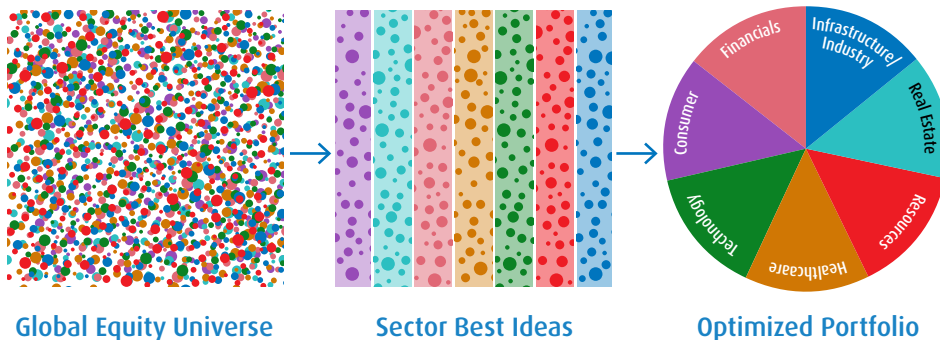
The Global Equity Challenge

The global equity universe can seem daunting, with over **12,000 stocks**, **11 GICS sectors** (including 24 industry groups, 69 industries, and 158 sub-industries), and more than **\$100 trillion** in market capitalization.

BMO GAM's 20-person Global Equity Team has the **experience** to make sense of the global equity universe AND the **full stock-picking authority** to capitalize when they identify an opportunity.

Rather than taking a style or region-based approach to the global equity universe, the Global Equity Team divides up the world by sector. Through this comprehensive strategy, each team member is empowered to develop true expertise over their own domain, with the team members' best sector ideas coming together to form the core of our global portfolio.

The team's deep industry and corporate relationships and advanced insights into industry trends—including supply chains, patents, and regulatory environments—allow them to identify superior investment opportunities and stay ahead of the curve.



Diverse, Experienced Portfolio Managers

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.



13 CFA charterholders and 9 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.

Unique Benefits

Experience: The Global Equity team's 300+ years of combined experience and established networks within their sectors enables them to identify sector risks and opportunities that others may miss.

Knowledge: Sector specialist PMs employ **proprietary sector valuation methods** and other tools to curate this high-conviction global portfolio.

Holistic Risk Management: Diversification across sectors and industries, with sector weights rebalanced to within 2.5% of the MSCI World Index sector weights on a regular basis.

Growth Potential: A 100% allocation to our team's best global stock ideas, with bottom-up, company-specific insights and deep knowledge of the alpha generators within each GICS sector.

Nimble Execution: Decentralized decision-making increases speed with which the portfolio can be adjusted as new, attractive investment opportunities arise.

Global Perspective: A unique approach providing global insights, including supply chains and industry-specific trends.

Meet the Global Equity Team



Jeff Elliott, PhD, CFA, MBA
Head of Global Equity, Portfolio Manager

REIT



Kate MacDonald, CFA, MFin
Portfolio Manager



Hussam Maqbool, CFA
Senior Analyst

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



Marco Iaboni
Analyst



Jeremy Yeung, CFA
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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
Associate Portfolio Manager



Alex Payne, CFA
Senior Analyst



Nicholas Cevallos
Analyst

Healthcare



Jeff Elliott, PhD, CFA, MBA
Head of Global Equity, Portfolio Manager



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¹ As of June 24, 2024. Subject to change without notice.

² Benchmark: MSCI World Index.

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