

Equities – video transcript

Narrator: Saurabh Moudgil

[A MALE WEARING A BLAZER AND OPEN NECK SHIRT APPEARS ON SCREEN AND BEGINS TO TALK]

Hi, my name is Saurabh Moudgil, and I specialize in equity investments, or common shares. [THE SPEAKERS NAME AND COMPANY APPEAR IN THE BOTTOM RIGHT OF THE SCREEN]

[ONSREEN TRANSITION FROM IMAGE OF SPEAKER TO ANIMATED ICONS THAT SUPPORT THE SPEAKERS COMMENTS IN VOICEOVER FORMAT]

The primary objective of the Manulife Yield Opportunities Fund is to provide income, so equities are a relatively small portion of the portfolio.

While the exposure may be small, equities play an important role nonetheless. They help to achieve the fund’s secondary objective — long-term capital appreciation.

They also provide valuable diversification. As an asset class, equities tend not to move in the same direction as bonds and other debt securities in response to market events.

And finally, there are tax benefits to holding equities. They generate capital gains, which are taxed less heavily than the interest produced by the fund’s fixed-income holdings.

Where a company pays dividends, we want to see a history of steady and increasing payments. We always like to keep an eye out for ways to add to that income stream for investors.

We have the flexibility to invest in any sector, from financials to information technology, depending on where we perceive the best value to be.

[ONSREEN TRANSITION FROM IMAGES OF ANIMATED ICONS BACK TO LIVE ACTION OF THE SPEAKER IN FRONT OF THE CAMERA]

We look for companies with strong competitive advantages that are well managed companies with strong fundamentals. Importantly, they have a long runway to reinvest their profits at great returns and increase wealth.

[NEW FRAME: THE WORDS ‘TO LEARN MORE, CONTACT YOUR MANULIFE INVESTMENT MANAGEMENT SALES REPRESENTATIVE’ APPEAR ON SCREEN]

[NEW FRAME: THE WORDS “INVESTING. DO IT DIFFERENT.” WITH LEGAL DISCLOSURE BENEATH THEM. THE LEGAL DISCLOSURE READS AS FOLLOWS:
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Any amount that is allocated to a segregated fund is invested at the risk of the contractholder and may increase or decrease in value.

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[NEW FRAME: THE MANULIFE INVESTMENT MANAGEMENT LOGO APPEARS ON SCREEN]

[THE VIDEO ENDS]

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