Manulife Investment Management

Manulife Asset Allocation Portfolios

Get to know Manulife Investment Management's multi-asset solutions team

Manulife Investment Management's multi-asset solutions team is an investment team consisting of over 60 experienced investment professionals dedicated to managing multi-asset portfolios, including Manulife Asset Allocation Portfolios. For more than 25 years, the team has built its reputation and global wealth management credentials on its asset allocation expertise. They currently manage over CAD $210 billion[1] in the U.S., Canada, Asia and Europe. They have an extensive intellectual capital base that spans the world, from Toronto and Boston to Hong Kong and London (UK), and includes portfolio managers, analysts, economists, beta management specialists, portfolio specialists and a derivatives group. Applying active asset allocation successfully takes an expert team.

Multi-Asset Solutions Team[2]

A global team with more than 60 investment professionals across 5 geographies

Asset Allocation

Boston
9 Investment Professionals

Toronto
3 Investment Professionals

Hong Kong
8 Investment Professionals

London
1 Investment Professional

OCIO and Fiduciary Solutions

Boston
4 Investment Professionals

Macroeconomic Strategy

Toronto
2 Investment Professionals

Montreal
2 Investment Professional

Hong Kong
1 Investment Professional

Systematic and Quantitative Solutions

Montreal
10 Investment Professionals

Toronto
7 Investment Professionals

Boston
4 Investment Professionals

Strategy and Business

Montreal
1 Investment Professional

Boston
1 Investment Professional

Toronto
1 Investment Professional

Client Portfolio Management

Boston
3 Investment Professionals

Hong Kong
1 Investment Professional

Meet the team behind the Manulife Asset Allocation Portfolios: Committed to quality investment management

Portfolio Management

Nathan Thooft, CFA
Sr. Portfolio Manager, CIO, Multi-Asset Solutions Team, Global Head of Asset Allocation
21 Years' Experience

James Robertson
Sr. Portfolio Manager
Head of Asset Allocation, Canada & Global Head of Tactical Allocation
40 Years' Experience

Alexandre Richard, CFA
Portfolio Manager
12 Years' Experience

Macroeconomic Strategy

Frances Donald
Global Chief Economist & Head of Global Macroeconomic Strategy
14 Years' Experience

Sue Trinh
Head of Macro Strategy, Asia
21 Years' Experience

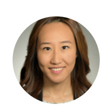
Alex Grassino
Head of Macro Strategy, North America
21 Years' Experience

Eric Theoret
Global Macroeconomic Strategist
14 Years' Experience

Erica Camilleri
Global Macro Analyst
2 Years' Experience

Investment Research

Vlad Kyrychenko, PhD, CFA
Sr. Investment Analyst, Asset Allocation Forecasting
27 Years' Experience



Jenny Kim, CFA
Sr. Investment Analyst
11 Years' Experience

Tony Zhou
Sr. Investment Analyst
11 Years' Experience

Client Portfolio Management

Benjamin Forssell, CFA
Client Portfolio Manager
22 Year's Experience

[1] As at December 31, 2021.
[2] As at March 31, 2022. Manulife Asset Allocation Portfolios are managed by Manulife Investment Management Limited. Manulife Investment Management is a trade name of Manulife Investment Management Limited.
Manulife Asset Allocation Portfolios are available in the InvestmentPlus Series of the Manulife GIF Select, MPIP Segregated Pools and Manulife Segregated Fund Education Saving Plan insurance contracts offered by The Manufacturers Life Insurance Company.

Manulife Investment Management

Get to know the Investment Process

The multi-asset solutions team is a strategic, long-term allocator of capital that can take advantage of shorter term opportunities in the market. Overall, the team combines their strengths; strategic asset allocation and opportunistic asset allocation.

Multi-asset solutions team's investment process

Step 1 →

Build Expected Return Forecasts

- 5 year time horizon
- 140 different asset classes
- Distinct approaches for equity, fixed income and alternatives

Step 2 →

Asset Class & Strategy Selection

- Asset allocation a primary driver of returns
- Strategies should be complementary
- Annually reviewed

Step 3

Portfolio Construction

- Short-term opportunities reviewed weekly
- Emphasis on risk management

The multi-asset solutions team's investment process is time – and cycle – tested, consistent and scalable. Constant diligence to help mitigate investment risks is hallmark of their approach.

Process summary

Strategic Asset allocation +

- 5 year time horizon
- Reviewed quarterly
- Annual re-optimization establishes base-case asset allocation

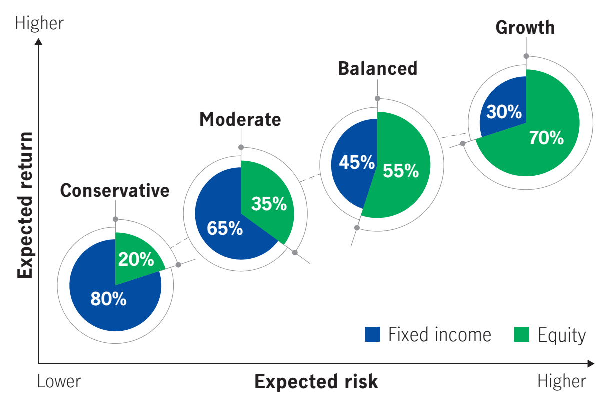
Opportunistic Asset Allocation

- 3 month – 18 month time horizon
- Reviewed weekly
- Quantitative models supported by fundamental decision-making establish views to deviate from strategic view

Manulife Asset Allocation Portfolios adhere to the multi-asset solutions team's disciplined investment process.

Comprising four actively managed asset allocation portfolios, Manulife Asset Allocation Portfolios provide complete solutions for clients who prefer a disciplined approach to investing and the comfort of knowing professionals are managing risk. Each portfolio is designed for a specific risk tolerance and return objective. They're simple to understand, easy to use, and provide access to some of the most popular investment strategies that Manulife Investment Management offers in a single solution.

Risk and return



For illustrative purposes only. Breakdowns shown are based on target allocations.

To learn more, contact your advisor or visit **manulifeim.ca**

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