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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 billion¹ 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 Team²

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, CFAClient Portfolio Manager
22 Year's Experience

¹ As at December 31, 2021.

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 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.

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.

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

Process summary



Strategic Asset



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

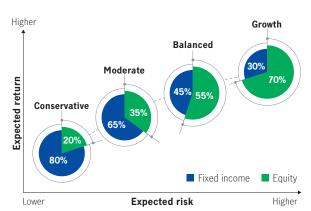


Opportunistic Asset Allocation

- 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

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments and the use of an asset allocation service. Please read the fund facts as well as the prospectus of the mutual funds in which investment may be made under the asset allocation service before investing. The indicated rates of return are the historical annual compounded total returns assuming the investment strategy recommended by the asset allocation service is used and after deduction of the fees and charges in respect of the service. The returns are based on the historical annual compounded total returns of the participating funds including changes in unit value and reinvestment of all distributions and do not take into account sales, redemption, distribution or optional charges or income taxes payable by any securityholder in respect of a participating fund that would have reduced returns. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. Manulife Asset Allocation Portfolios are managed by Manulife Investment Management Limited (formerly named Manulife Asset Management Limited). Manulife Investment Management is a trade name of Manulife Investment Management Enimited. Manulife, Manulife Investment Management, the Stylized M Design, InvestmentPlus, and Manulife Investment Management & Stylized M Design 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. The Manufacturers Life Insurance Company (Manulife) is the issuer of insurance contracts containing Manulife segregated funds and the guarantor of any guarantee provisions therein. Manulife Investment Management is a trade name of The Manufacturers Life Insurance Company. Any amount that is allocated to a segregated fund is invested at the risk of the contractholder and may increase or decrease in value. Age restrictions