

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity



Previous



Next

 **Manulife** Investment Management

Investor brochure

Harnessing the power of global *megatrends*

Thematic investing

Available on both mutual fund and segregated fund platforms.



What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

Table of contents

What is thematic investing	3
Why invest thematically?	7
Why Pictet?	8
Your thematic opportunity	11



Previous

Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

What is *thematic* investing?

Investing in global equities using a thematic approach is very different from traditional investment styles. Portfolio managers of thematic investing funds **identify themes underpinned by secular megatrends** set to structurally change the way we live, how society operates, and how business gets done. Stocks representing different themes are selected based on how well the managers believe those stocks are positioned for the future as it's redefined by these deep structural changes.



Previous



Next

What is thematic investing?

Why invest thematically?

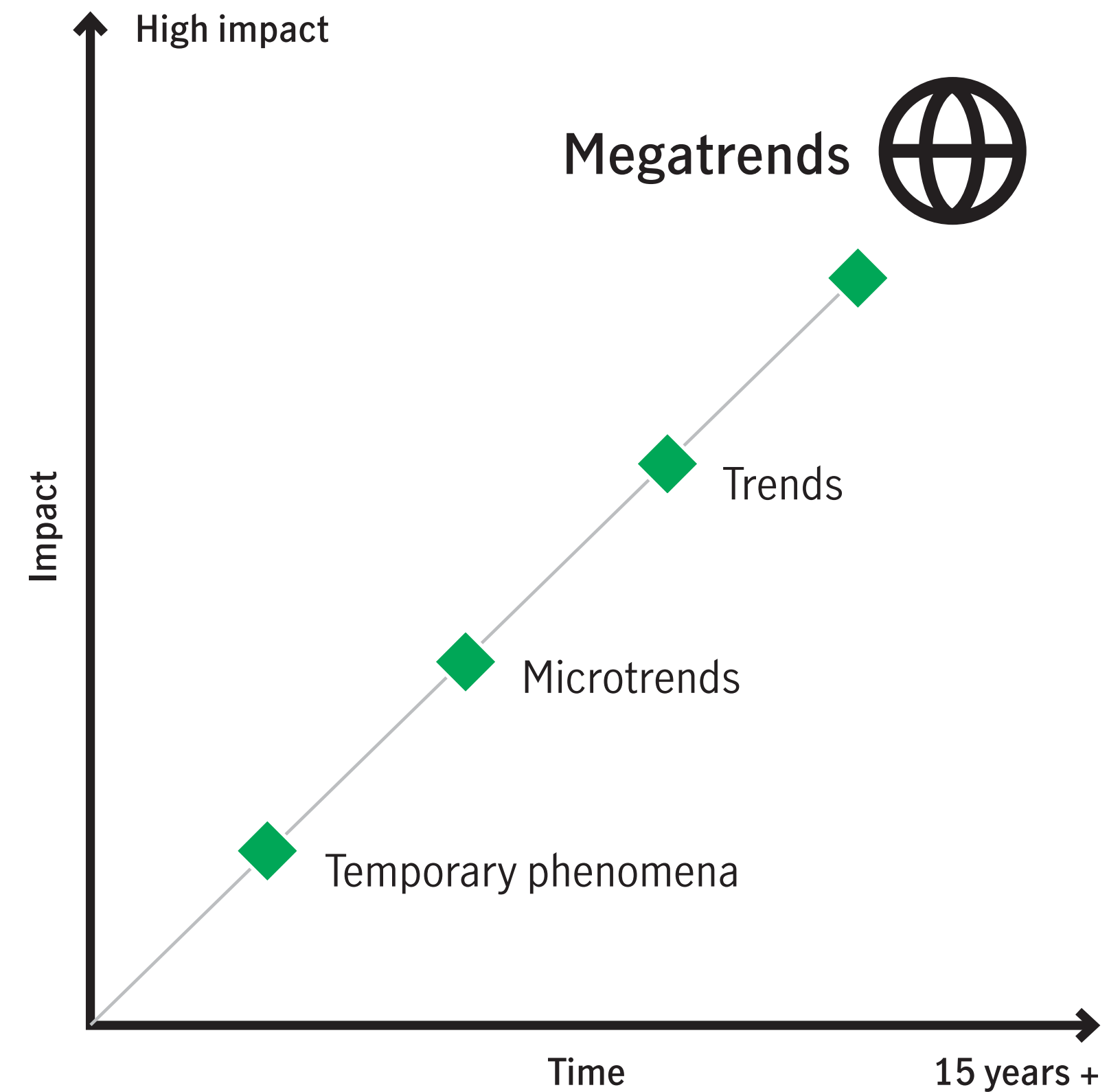
Why Pictet?

Your thematic opportunity

Megatrends play out over *decades*

Megatrends are powerful forces that transform the future of our world and the global investment landscape. They range from technological paradigm shifts such as the network economy to long-term changes in global demographics.

Megatrends are subject to change over time.



Previous



Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

Current megatrends

Pictet Asset Management is a pioneer in thematic investing and a firm that Manulife Investment Management has selected to manage thematic funds as part of our network of specialized asset managers. Through Pictet's partnership with the Copenhagen Institute for Futures Studies (CIFS), they have identified **14 megatrends**, each of which they believe may drive future investment opportunities.

1	Network economy	The increasing connectedness of business processes and economic activity, enabling the transfer of knowledge and goods directly from provider to receiver	8	Economic growth	The increase in the world's capacity to produce goods and services
2	Sustainability	The ability to meet current needs without compromising the ability of future generations to meet theirs	9	Individualization	The evolution of a society once characterized by collective norms to one in which freedom of choice and the expression of one's individuality are more dominant
3	Knowledge society	Knowledge is becoming an economic resource in the way raw materials, labor, and capital have traditionally been as society transitions from the industrial age to the information age	10	Commercialization	The process of increasing the efficiency of a sector by transforming it into a commercial business
4	Immaterialization	Consumers are increasingly focusing on the intangible qualities of products and services, such as their ethical or aesthetic appeal, rather than their material attributes	11	Globalization	The increasing global connectedness and flow of people, capital, products, services, information, technology, and culture
5	Democratization	More power to the people—politically, economically, and culturally	12	Polarization	When extremes grow at the expense of the middle ground
6	Acceleration and complexity	The increase in the rate of technological progress over time, resulting in products having a shorter shelf life	13	Focus on health	Aging populations, rising wealth, and technological advances are making health a major source of expenditure for governments, organizations, and individuals across the world
7	Technology development	The increase in the world's capacity to produce goods and services	14	Demographic development	The widening demographic divide between countries with younger workers and those, mostly in the West, with an aging and shrinking workforce

Megatrends are subject to change over time.



Previous

Next

What is thematic investing?

Why invest thematically?

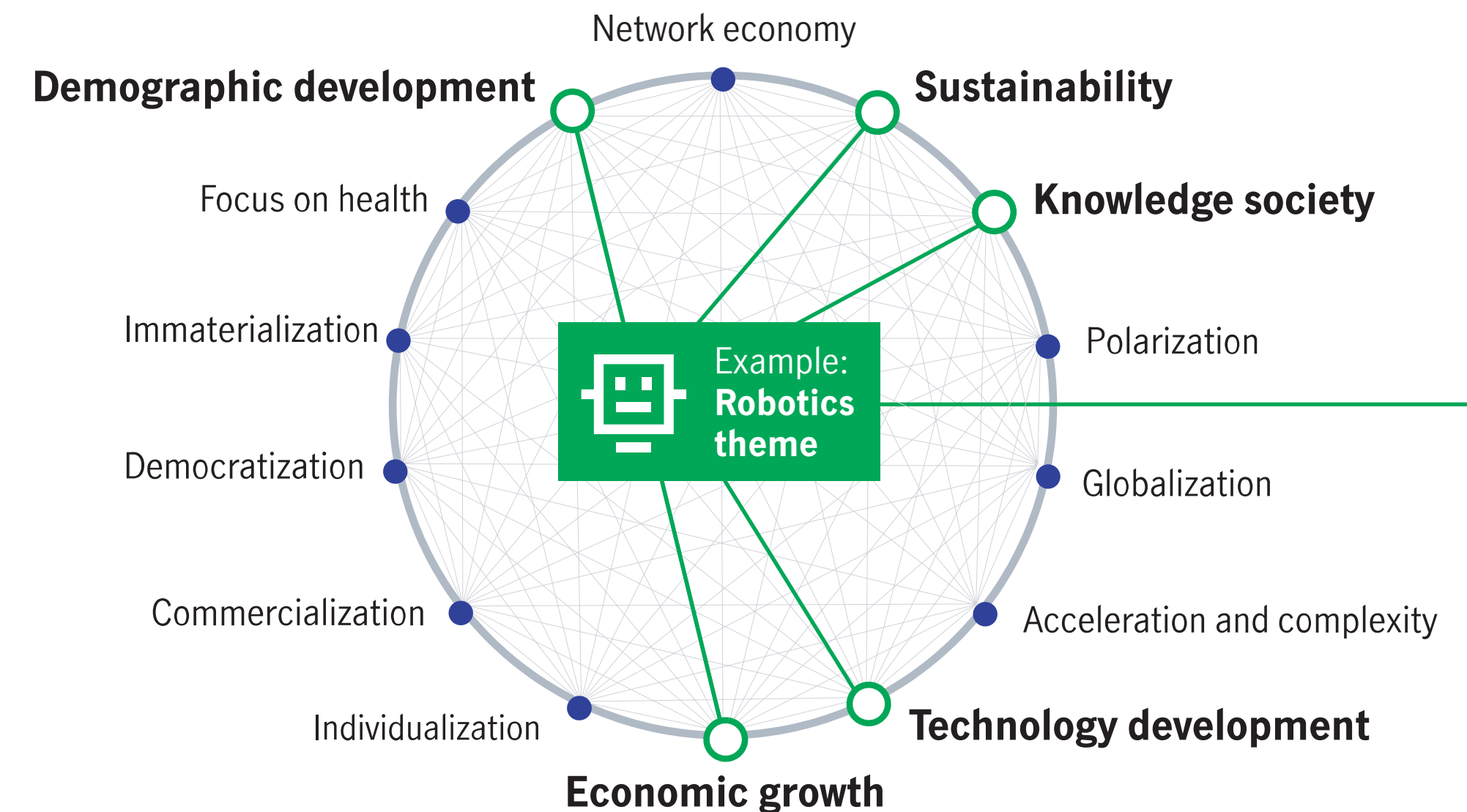
Why Pictet?

Your thematic opportunity

Themes: investable ideas where megatrends *converge*

Thematic investing offers exposure to those companies considered most likely to maintain advantages in the future. These competitive advantages may often be found in companies that are able to leverage multiple megatrends through their business.

Consider the example of robotics, a theme that's supported by five megatrends—demographic development, sustainability, knowledge society, technology development, and economic growth.



Pictet aims to pick out the companies **best positioned** to potentially benefit from these megatrends.

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

Why invest *thematically*?

Thematic investing focuses on the long term, which helps investors benefit from secular growth opportunities across a diverse range of regions, industries, and companies. In this way, it offers several key benefits to investors.



Alpha generation for the long term

With a portfolio of stocks that are leveraged to megatrends, thematic investing may offer exposure to future generations of market leaders.



Underappreciated value opportunities

Investing in stocks that are well positioned to benefit from long-term secular growth trends may mean focusing on opportunities whose value has yet to be captured by the market.



Portfolio diversification

Thematic investment strategies can cross traditional equity investing boundaries, including sectors and geographies. By being benchmark-agnostic and conviction-weighted, thematic strategies may have low overlap with global equity indexes.

Thematic investing is not a substitute for professional advice. Please contact your financial professional for more information.

Thematic investing is not a substitute for professional advice. Please contact your financial professional for more information.

Diversification does not guarantee a profit or eliminate the risk of a loss. Ask your financial professional whether thematic investing would be an appropriate addition to your portfolio.



Previous

Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity



Previous



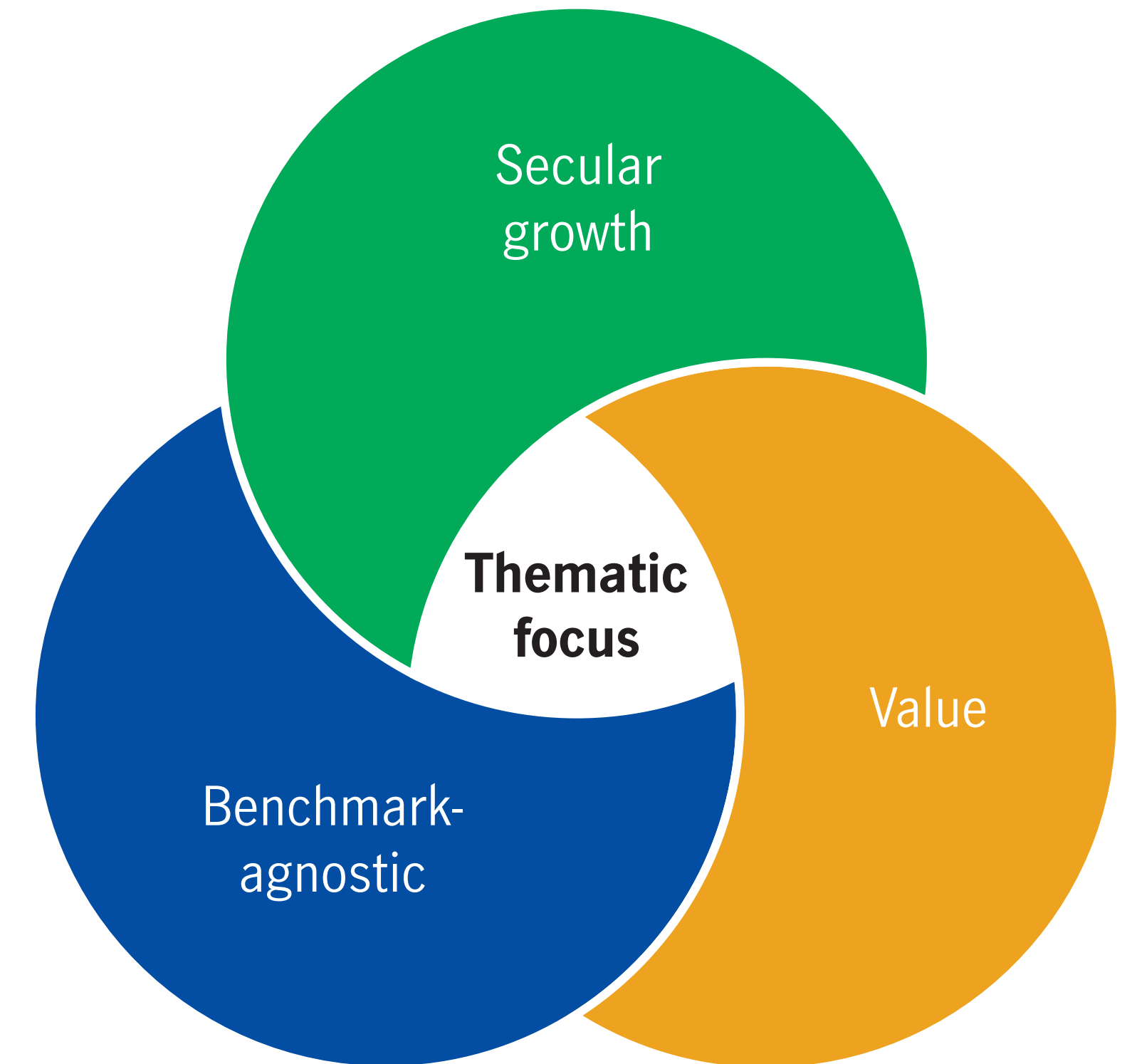
Next

Why Pictet Asset Management?



Thematic investing expertise

Pictet has been a pioneer in thematic investing for more than 25 years. Based in Geneva, Switzerland, Pictet is recognized as one of the largest thematic investors, as it provides thematic solutions to some of the world's largest and most sophisticated investors. With Manulife Global Thematic Opportunities Fund, we bring Pictet's institutional market leadership and innovative thematic approach to the individual Canadian-based investor. Pictet's deep expertise in thematic investing enables the firm to manage specialized strategies focusing on individual themes as well as broader strategies encompassing multiple themes.



What is thematic investing?

Why invest thematically?

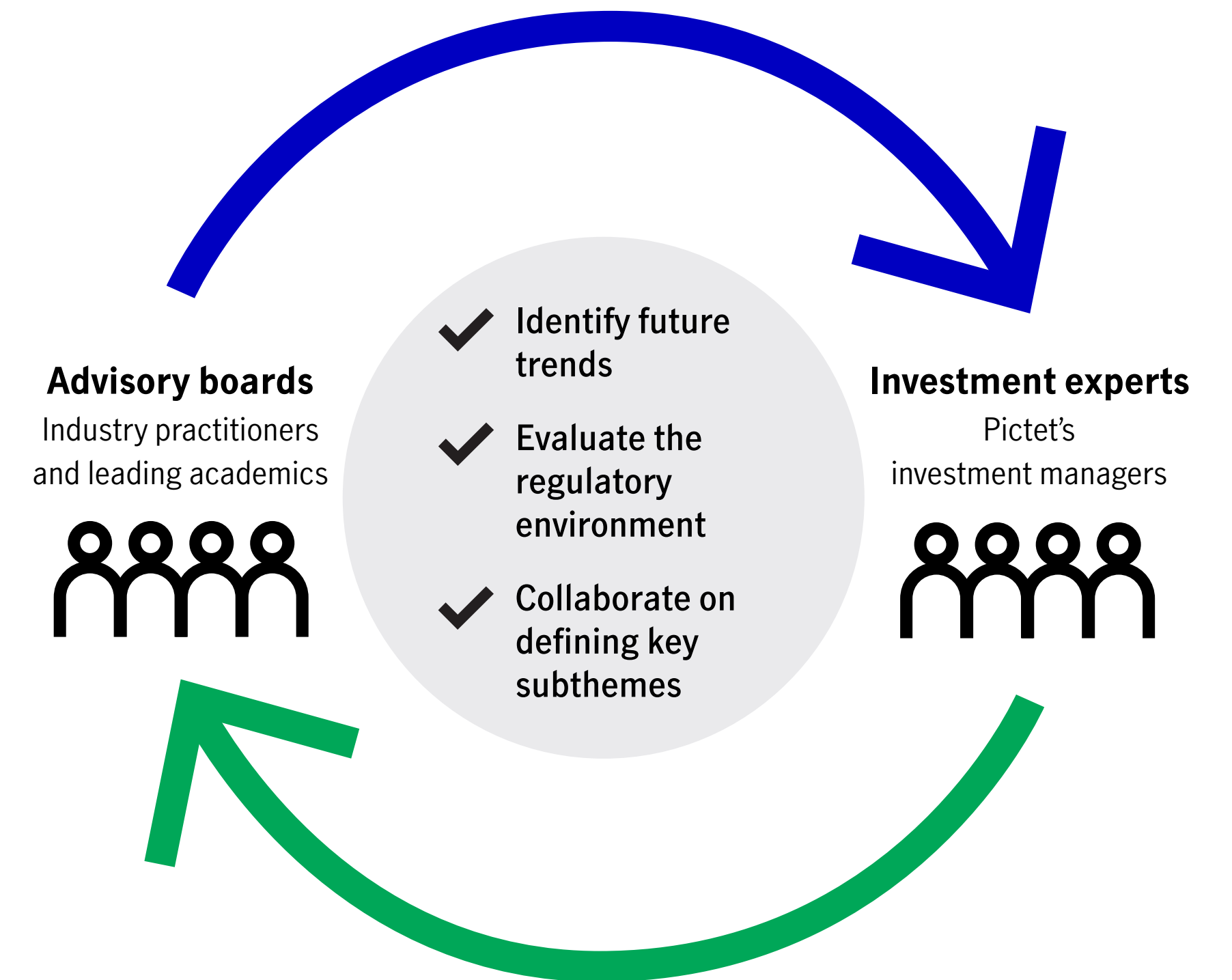
Why Pictet?

Your thematic opportunity

Combining investment and advisory *expertise*

Each theme reflected in this fund is lead by portfolio managers and supported by a team of investment experts. They're neither generalists nor order-takers but seasoned specialists who've come to know their themes and related industries over many years and market cycles.

These teams work in collaboration with megatrend experts, a distinguished group of industry practitioners and academics who've developed a deep understanding of the structural trends transforming our world.



Previous

Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

About Pictet Asset Management

Pictet Asset Management is an independent asset manager, overseeing **over CAD\$339 billion** as of June 30, 2021, with nearly one-third of that total managed by the firm's thematics team. Pictet provides specialist investment services through segregated accounts and investment funds to some of the world's largest pension funds, financial institutions, sovereign wealth funds, intermediaries, and their clients.



“From the 1990s onward, our **innovative thematic equity strategies** have looked beyond benchmarks to offer investors the opportunity to capitalize on the most powerful trends shaping our world.”

—Pictet Asset Management



1980

The year that Pictet Asset Management was created as the dedicated asset management entity of Pictet Group

1,000+

employees; more than one-third investment professionals

45

investment professionals on the thematics team

\$100B

in assets managed by the thematics team, as of 6/30/21



Previous

Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

Your *thematic* opportunity

Manulife Global Thematic Opportunities Fund

13 themes in a single portfolio

A rigorous approach is required to identify and prioritize investable themes that occupy the intersections of multiple megatrends. Pictet has identified a diverse series of **13 investable themes** from which the portfolio managers select among the best ideas for the fund.



Previous



Next








What is thematic investing?







Why invest thematically?

Why Pictet?

Your thematic opportunity

13 investable themes

	Biotech	Harness the power of medical innovation
	Clean energy	Join the transition to a lower-carbon economy
	Digital	Put the digital revolution to work in your portfolio
	Global environmental opportunities	Harness growth opportunities while safeguarding the environment
	Health	Support solutions that improve people's quality of life
	Human	Help people live more fulfilling lives
	Nutrition	Help prevent and cure disease

	Premium brands	Share in the potential growth of the global aspirational brands market
	Robotics	Discover the next frontier of technological achievement
	Security	Support the solutions that create a safer world
	Smart city	Harness the investment potential of sustainable, better-connected cities of tomorrow
	Timber	One of the world's most environmentally friendly, renewable resources
	Water	Water is an essential natural resource—and demand is rapidly rising



Previous



Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

Manulife Global Thematic Opportunities Fund

Objective: The Fund aims to achieve capital growth by investing mainly in equities of companies that benefit from global long-term market themes.

Category: Global equity

Strategy:

Focused exposure

Benchmark-agnostic investment approach focused on highest-conviction global equities

A thematic approach

Seeks to invest in themes supported by megatrends—large social, economic, political, environmental, and technological changes

Dedicated expertise

Each investment theme is led by portfolio managers and supported by a team of analysts as well as input from leading academics and industry experts

Available on both mutual fund and segregated fund platforms.



Previous



Next

What is thematic investing?

Why invest thematically?

Why Pictet?

Your thematic opportunity

A passion for providing solutions

We draw on more than a century of experience and offer that to advisors and investors alike. Although rooted in history, we're driven by the idea of challenging the status quo, partnering with advisors, and delivering real value to our customers. This passion for creating solutions is guided by the belief that our success is measured by that of our clients.

A specialist approach

We offer highly differentiated strategies across our areas of expertise – fixed-income, equity, balanced, and multi-asset solutions – each managed with a unique investment objective by a team with the expertise and experience to deliver. We complement these capabilities with access to a network of specialized unaffiliated asset managers from around the world.

A commitment to investing responsibly

Responsible stewardship is at the heart of our business and culture, both as an asset manager and as a steward of our clients' capital. Across our diverse portfolio of businesses, we seek to be a global leader of sustainable asset management, creating long-term value for our stakeholders while helping realize a more viable trajectory for the global economy.



Previous



Next

 **Manulife** Investment Management

As of October 2021. Views and opinions that are subject to change without notice. The historical success, or Manulife Investment Management's belief in the future success of any of the strategies is not indicative of, and has no bearing on, future results. No investment strategy or risk management technique can guarantee returns or eliminate risk in any market environment. Manulife Investment Management does not provide investment, legal or tax advice, and you are encouraged to consult your own lawyer, accountant, or other advisor before making any financial decision.

Manulife Funds and Manulife Corporate Classes are managed by Manulife Investment Management Limited. Manulife Investment Management is a trade name of Manulife Investment Management Limited. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the fund facts as well as the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

Manulife Investment Management is a trade name of The Manufacturers Life Insurance Company. The Manufacturers Life Insurance Company (Manulife) is the issuer of the GIF Select insurance contract, and the Manulife Private Investment Pools - MPIP Segregated Pools (MPIP Segregated Pools) insurance contract and the guarantor of any guarantee provisions therein.

To speak with Manulife Investment Management about segregated funds, call 1-888-790-4387.

For more information speak to your advisor and visit manulifeim.ca/gto

Manulife, Manulife Investment Management, Stylized M Design, and Manulife Investment Management & Stylized M Design are trademarks of The Manufacturers Life Insurance Company and are used by it, and by its affiliates under license.

MP1894132E 10/21 AODA