

Dynamic[®]

The Dynamic Advantage



Dynamic is a Canadian success story, built on non-negotiable beliefs that drive everything we do. We began by challenging the status quo in investment management, and we continue to do so today.

Since beginning as an independent investment club in Montreal, we have evolved into a powerful, difficult-to-replicate company that provides investors with many advantages. We view ourselves first and foremost as ambassadors of efficient portfolio construction, and we believe that our job is to produce investment solutions that meet and exceed expectations.

Dynamic at a glance (as at December 31, 2025)



Through Legitimately Active Management[®], we aim to add significant value to any investment portfolio.

We firmly believe that legitimately active management matters.
We consider it to be the cornerstone of efficient portfolio construction.

True active management offers investors:

- a definable method for growing wealth;
- real value for the fees they are charged;
- specific solutions, not just products; and
- advice designed to protect investors from the mistakes of the herd.

Our investment environment is difficult to create and is equally hard to replicate.

Our Portfolio Managers are provided with an investment environment that allows them to have an independent approach to investing.

- We do not believe in unnecessarily constraining our Portfolio Managers when they find a great investment opportunity.
- Dynamic is investing beyond the benchmark. Our Portfolio Managers do not start with the benchmark when building portfolios. We let the market provide us with opportunity, rather than direction.
- We do not wait for others. Our Portfolio Managers are encouraged to be opinionated and have high conviction in their ideas. We are comfortable in taking an approach that has not been done before.
- The highly competitive drive to be the best and deliver strong longterm performance to our clients is what unites our investment team.
- Our Portfolio Managers take full ownership of their products by personally investing their own money directly alongside our clients' in the funds they manage.

Dynamic believes that...

Advice matters

- Investors are best served when they *Invest with Advice*.
- Investors who work with advisors, are more prepared for retirement, and have greater satisfaction with their financial well-being.
- That's why we are defenders of the value of good financial advice.

Access matters

- Our open access culture allows us to be leaders in bringing solutions to market that address and anticipate both the needs of investors and the advisors who serve them.

Performance matters

- Too many in the financial industry have convinced themselves that active management does not matter. In fact, we firmly believe that pursuing legitimately active management is key to delivering measurable outperformance.

Investment funds matter

- Our actively managed funds can provide substantial value and help differentiate investor portfolios in a market crowded with indexers.
- Mutual funds can fulfill the needs of any investor portfolio, from the smallest investment accounts to the most affluent households.

Earning our fees matters

- Closet indexing funds that charge full fees tarnish the industry. We offer high-conviction, truly active products that distinguish themselves from the competition.

The Dynamic advantage

We continually strive to deliver differentiated performance beyond the benchmark.

- We are portfolio difference-makers. Our actively managed solutions can add significant value to any portfolio.
- Our people are insightful, opinionated, non-conformist, accessible, passionate, dedicated, performance-driven, and experienced.
- Our culture is Dynamic in name and Dynamic in action. We take a boutique approach, but with a competitive, forward-thinking global mindset.
- We are committed to earning our fees. We will do so by being truly active and deliberately differentiated from our competitors.
- Our product lineup is relevant, forward-looking and diversified. We will keep up with your investment needs today and in the future.

We are more dynamic than ever.

Speak to your financial advisor about how to make Dynamic a part of your portfolio.

dynamic.ca

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