

# Dynamic Integrated Portfolios

A complete approach designed to build and preserve wealth

## Introducing Dynamic Integrated Portfolios

In today's fast changing markets, investors need a solution that can both build and protect their wealth. Dynamic Integrated Portfolios provide **a complete solution** designed to deliver higher growth potential with lower volatility, compared with traditional portfolios. By incorporating alternative asset classes and strategies, these portfolios become resilient and adaptive across market cycles.

Backed by the strength of the Multi-Asset Management Team, Dynamic Integrated Portfolios are actively rebalanced to maintain an optimal asset mix, helping investors stay on track to achieve their financial goals.

### Key Benefits



#### Simplified access to diversification

A single-ticket solution that streamlines portfolio construction by offering broad diversification – including alternatives – in one easy-to-access product.



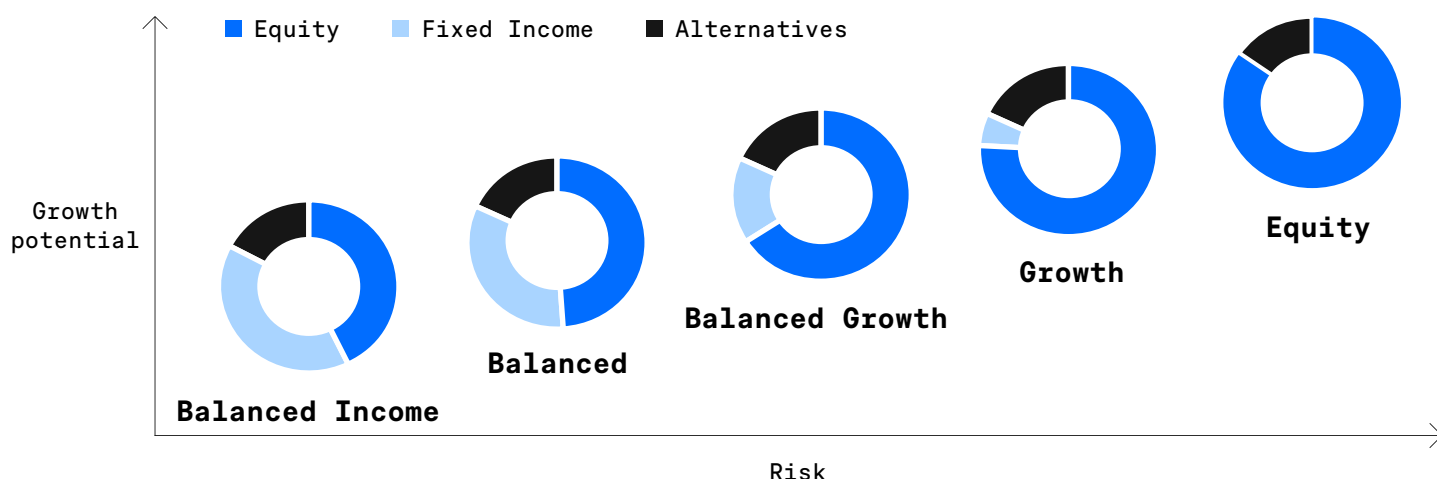
#### Enhanced portfolio resilience

Leverages Dynamic's renowned active management, strategically complemented by cost-effective passive strategies, designed to build resilient portfolios.



#### Built for evolving investor needs

Designed to address increased market volatility and shifting market dynamics with a broader set of investment tools typically used by institutional investors and without the restrictive minimum investment requirements.



For illustrative purposes only.

Target allocations are subject to change. Dynamic Integrated Balanced and Balanced Growth Portfolios are also offered in a Corporate Class version.

**Dynamic**<sup>®</sup>

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## The Multi-Asset Management Team

Backed by the strength and experience of Dynamic's Investment Team, the Multi-Asset Management Team is a market leader in designing and managing multi-asset portfolio solutions.

### Experience. Discipline. Results.



Deep experience across a broad range of asset management disciplines, including asset allocation, portfolio construction, and manager selection.



Disciplined investment process to help deliver multi-layered, valued-added return potential while managing volatility.



Extensive team capabilities support a track record of delivering competitive long-term, risk-adjusted results.

## Multi-Asset Management Team: By the Numbers<sup>2</sup>

A dedicated team of  
**20**  
investment professionals

Average portfolio manager  
experience:  
**24 years**

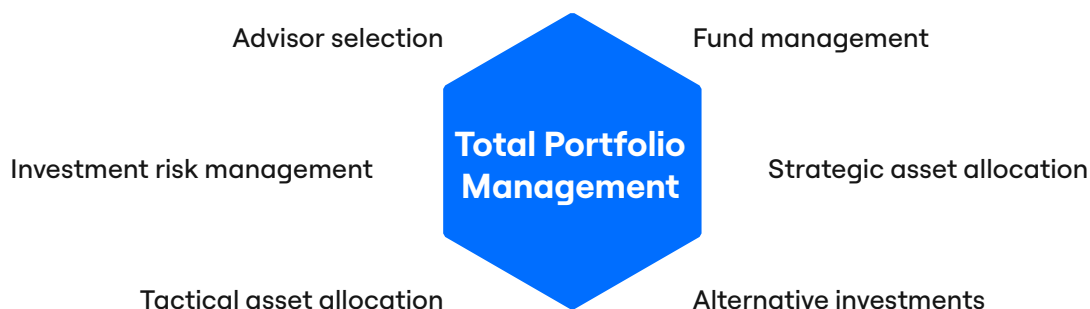
Assets under management:  
**\$138 billion**

<sup>2</sup> As of June 30, 2025.

## An integrated approach to portfolio construction

The Multi-Asset Management Team utilizes a robust process for constructing integrated portfolios that draw on a wide range of assets – from active and passive ETFs to alternative assets, mutual funds, private assets and much more. Focused on long-term, risk-adjusted returns while having the resilience to capture short-term opportunities, Dynamic Integrated Portfolios represent the next generation of portfolio sophistication.

## The Power of Total Portfolio Management



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Fund name	Series T/FT Target Rate	FE			NL		
		A	T	DCAF	F	FT	I
Dynamic Integrated Balanced Income Portfolio	–	1095	–	–	276	–	1591
Dynamic Integrated Balanced Portfolio	5%	5210	1073	2170	5214	3832	1594
Dynamic Integrated Balanced Class Portfolio	5%	5280	5284	5287	2890	–	–
Dynamic Integrated Balanced Growth Portfolio	6%	263	1080	2173	278	1099	1595
Dynamic Integrated Balanced Growth Class Portfolio	6%	5290	5294	5297	2891	–	–
Dynamic Integrated Growth Portfolio	7%	5220	1086	2176	5223	3834	1596
Dynamic Integrated Equity Portfolio	8%	267	1084	2179	277	3833	1597

Fundserv prefix: DYN

Contact your advisor to learn more  
about Dynamic Integrated Portfolios.

## Customer Relations Centre

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