



DYNAMIC
LIVE
IN CONVERSATION

Dynamic Funds[®]
Invest with advice.



Canada: Just buy it! It's good for you

Don Simpson, BBA, CFA

Vice President & Senior Portfolio Manager

Dynamic Funds[®]
Invest with advice.

Investment Team



Don Simpson, BBA, CFA

Vice President &
Senior Portfolio Manager

Industry experience: +30 years
Firm experience: 12 years



Eric Mencke, CPA, CA, CFA

Vice President &
Portfolio Manager

Industry experience: 30 years
Firm experience: 8 years



Rory Ronan, CFA

Vice President &
Portfolio Manager

Industry experience: +30 years
Firm experience: 6 years



Pete Robic, CPA, CA, CFA

Portfolio Manager

Industry experience: 17 years
Firm experience: 6 years



Lauree Wheatley, BBA, CFA

Portfolio Manager

Industry experience: 23 years
Firm experience: 1 years

Investment philosophy

Long-term perspective

The market is emotional, but our process is not. Short-term uncertainty often leads to the best long-term opportunities.

Active management

Our benchmark agnostic approach seeks to outperform the market in the long term, without taking unnecessary risks.

Capital preservation

We manage well-diversified portfolios, with a focus on downside protection.

Manage over **\$8 billion in AUM**
across Dynamic Funds, Scotia,
and High Net Worth Channels

90+ combined years of
industry experience

AUM as of March 31, 2024

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Our Investment Process



Quality businesses

Growth over time

Barriers to entry

Strong free cash flow



Management assessment

Proven track records

Long-term focus

Compensation aligned with shareholders



Attractive valuations

Time value arbitrage

Unique insights not appreciated by market

Balance sheets / hidden assets

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Our Portfolio Construction Philosophy

Rigorous bottom-up investment process

Not theme driven

Diversification by industry and idea

9-11 GIC sectors at all times

Use foreign content to reduce risk

Primarily: info tech. & health care

Consistent foreign currency hedging strategy

50% hedging of foreign currency

Thank You For Your Partnership

Dynamic Canadian Dividend Fund

Series A: **DYN1040**

Series F: **DYN1840**

Dynamic Active Canadian Dividend ETF

Ticker: **DXC**

Important information

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