

DYNAMIC LIVE

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Back to Basics: Gold and Inflation

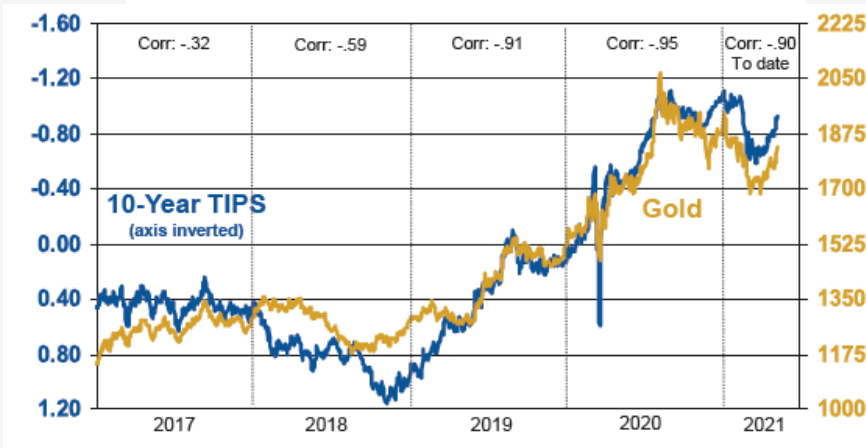
Robert Cohen

Vice President & Portfolio Manager

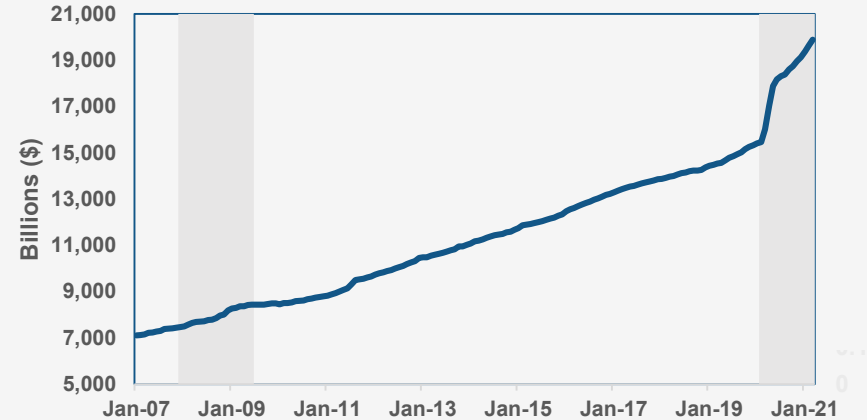
Back to Basics

Gold and Inflation

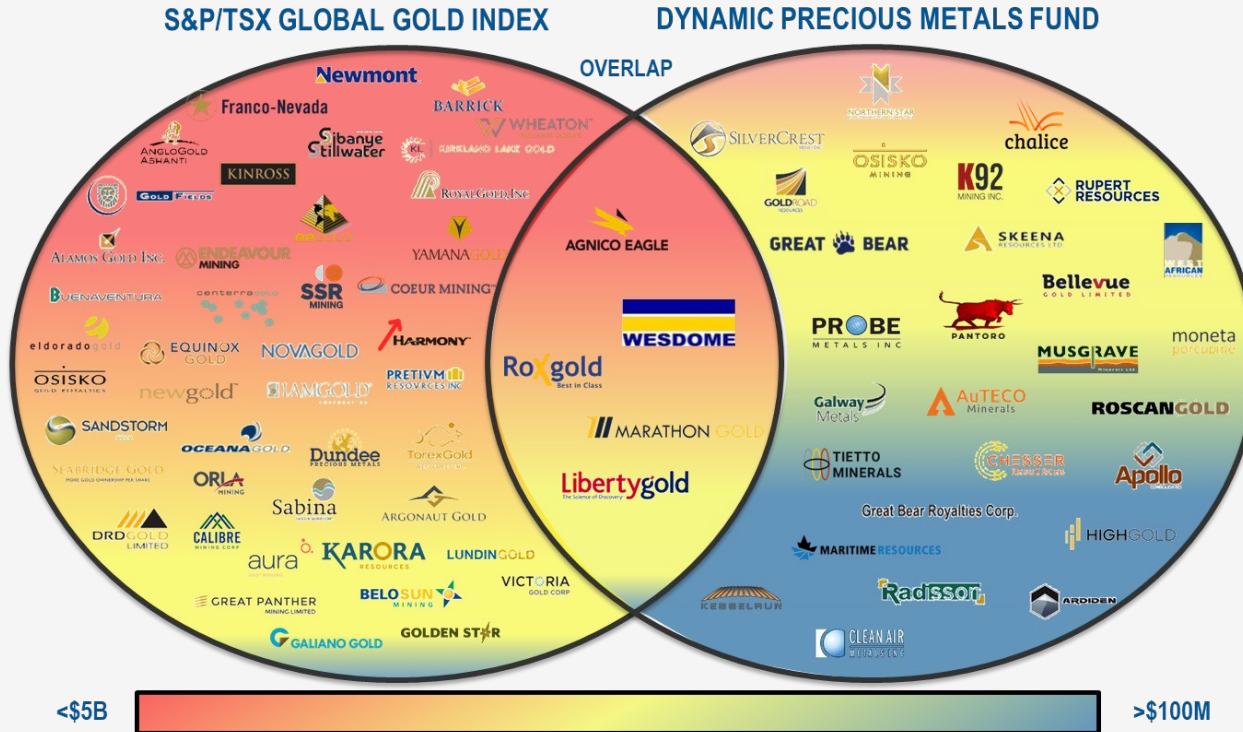
GOLD AND 10-YEAR TIPS



M2 MONEY SUPPLY



Dynamic Precious Metals Fund Active Management Matters



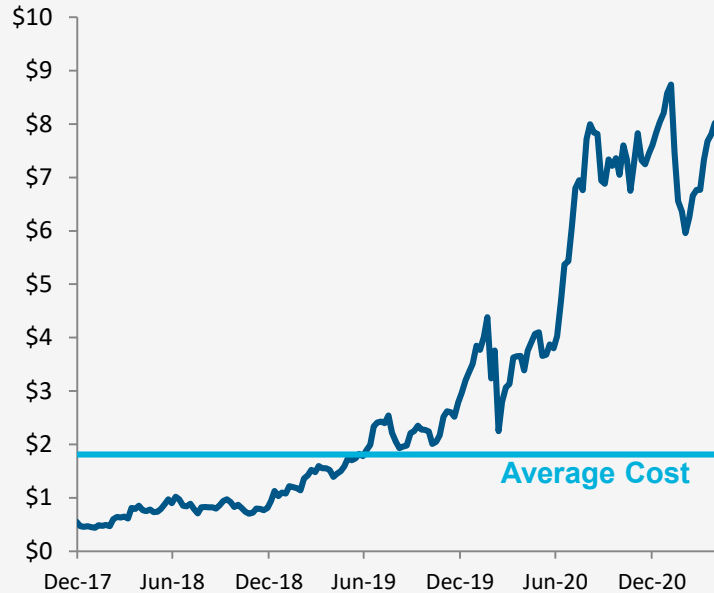
1832 Asset Management L.P., as of 12/31/20

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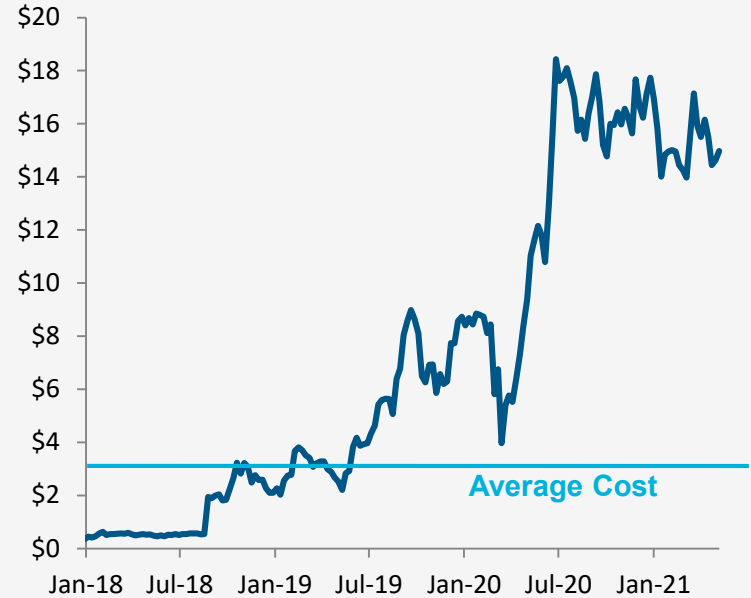
Long-Standing Holdings

A Few Favourites

K92 STOCK PRICE



GREAT BEAR STOCK PRICE



Source: Bloomberg, 1832 Asset Management as at 04/30/2021

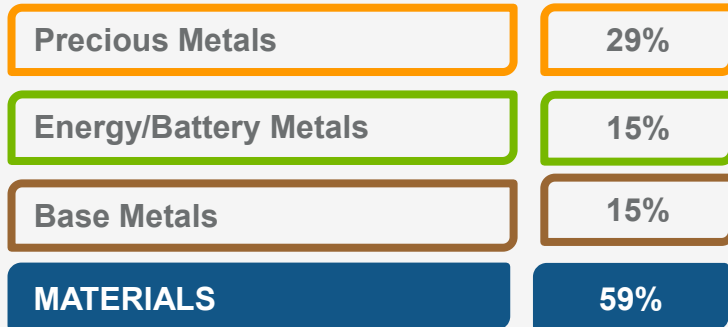
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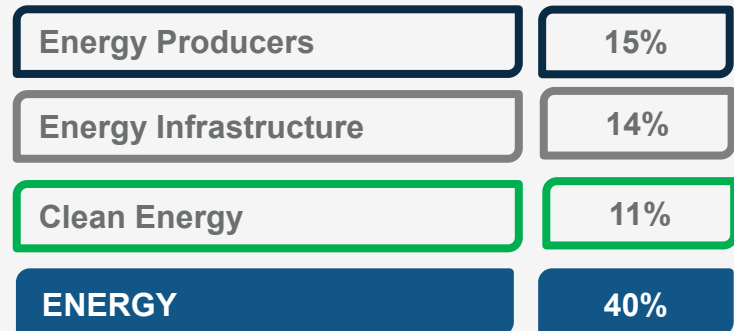
Dynamic Strategic Resource Class Portfolio Construction

- Flexible approach to the resource sector that can strategically shift between the different segments of the materials and energy industries
- High quality projects / strong management
- Experienced management team with direct industry experience

Materials



Energy



Source: Dynamic Funds, as of 4/30/2021

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Important information

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