DYNAMIC EDGE PORTFOLIOS
DESIGNED FOR INVESTORS.
Investments and investing may not be foremost in your mind, but achieving a more secure financial future probably is.

**SO WHAT’S THE ANSWER?**

DynamicEdge Portfolios are designed for investors. Investors who are more interested in the destination – having enough money for retirement or protecting their nest egg – than the journey. In just a few simple steps and with the help of your Financial Advisor you can make a single investment that can help you meet any or all of these goals.

Best of all, you can take comfort from knowing your investment is right for you, that it’s rigorously monitored to ensure it stays on track and is managed by some of the best in the business.
DIVERSIFICATION
Spreading your money across stocks and bonds – called diversification – is the cornerstone of careful investing. Diversification helps your portfolio by spreading risk, therefore reducing volatility.

MULTILAYERED DIVERSIFICATION
DynamicEdge Portfolios take the notion of diversification several steps further. Not only is your money spread across stocks and bonds but it is also carefully diversified in other ways:

• Among large, medium and small sized companies
• Across geographic regions
• Within different industries
• By managers with complementary investment styles

A smoother, more rewarding ride

Source: Morningstar Research Inc., 100% equities is represented by the S&P/TSX Composite Index; 50% equities/50% fixed income is represented by 50% S&P/TSX Composite Index and 50% FTSE TMX Canada Universe Bond Index. As at May 2018.

YOUR RETIREMENT OR PRE-RETIREMENT CASH FLOW
DynamicEdge Portfolios allow you to receive tax-efficient cash flow from your investments. You can work with your Advisor to customize the withdrawal amounts.
A PORTFOLIO THAT’S RIGHT FOR YOU

**DynamicEdge Portfolios**

DynamicEdge Portfolios bring together a mix of mutual funds into six distinct portfolios, each with a fixed asset allocation that remains constant over time. Some have more stocks (equities); some have more bonds (fixed income). Portfolios with a higher percentage of equities are considered more aggressive while those with a greater proportion of fixed income are considered more conservative. There’s a DynamicEdge Portfolio that’s right for your investment goals.

**Defensive**

20% Equities/80% Fixed Income

This asset mix is designed for investors who want to preserve capital, yet hold some equities to enhance long-term capital growth potential.

**Conservative**

35% Equities/65% Fixed Income

This asset mix is mostly fixed income with substantial equity exposure to enhance long-term capital growth potential.

**Balanced**

50% Equities/50% Fixed Income

This asset mix is designed for investors who want to participate in the growth potential of equities, yet hold a large allocation of fixed income as a buffer against downturns.

**Balanced Income**

50% Income-oriented equities/50% Fixed Income

Our balanced income portfolio is designed for those who require income-generating investments. Funds in this portfolio focus on dividend equities, preferred shares, infrastructure equities, investment grade bonds and high yield bonds.
SIMPLE OUTSIDE, SMART INSIDE
DynamicEdge Portfolios are designed to maintain a consistent investment strategy over time. Using daily cash flows, we will maintain your allocations close to target.

In addition, DynamicEdge Portfolios overseen by the Oversight Committee. This highly experienced team of investment experts will conduct periodical assessments with sophisticated monitoring techniques to make sure your investments remain on track.

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**EQUITY**
100% Equities
This most aggressive asset mix is intended for investors willing to accept short-term market volatility to maximize their long-term capital growth potential.

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**GROWTH**
80% Equities/20% Fixed Income
Designed for investors who seek higher growth potential, this allocation has appeal for investors with a long time horizon who still want some bonds to buffer short-term volatility.

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**BALANCED GROWTH**
65% Equities/35% Fixed Income
This asset mix tips the balance slightly towards growth potential, but still maintains a substantial allocation of fixed income investments to help smooth out the ups and downs of the market.
AN INVESTMENT MANAGER YOU CAN TRUST

DynamicEdge Portfolios are exclusively managed by Dynamic Funds, an investment management company with over 50 years of experience. Dynamic managers seek to add value through an active management approach that’s defined by independent thinking and strong conviction.

IT’S EASY TO TAKE ADVANTAGE OF EVERYTHING DYNAMICEDGE PORTFOLIOS HAVE TO OFFER

1. Complete a simple questionnaire with your Advisor to identify the DynamicEdge Portfolio most consistent with your goals and expectations.

2. Discuss your investment risk comfort zone with your Advisor and the length of time you expect to hold your investments.

3. Agree on the DynamicEdge Portfolio that works best for you and receive an Investment Policy Statement with details about your portfolio.

4. Notify your Advisor about any life changes that could require an adjustment to your investments, such as relationship changes, dealing with illness or receiving an inheritance.
CONTACT YOUR ADVISOR FOR MORE INFORMATION ON DYNAMIC EDGE PORTFOLIOS.

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