

Dina DeGeer Co-Lead of Bluewater team announces retirement

July 10, 2024 - Mackenzie Investments announced that Dina DeGeer, Senior Vice President, Portfolio Manager and Co-Lead of the Mackenzie Bluewater Team will be retiring as of September 1, 2024. Shah Kahn, Vice President, and Portfolio Manager will be promoted to Senior Vice-President, Portfolio Manager and Co-Lead of the Bluewater team. Shah will assume primary responsibility for the Bluewater Canadian mandates from Dina. Shah has been with Bluewater for 14 years and has been mentored as Dina's protégé for the past number of years for succession planning. Shah has been a sector generalist, specializing in Canadian equities and a lead researcher and a portfolio manager for Bluewater's Canadian mandates.

David Arpin, Senior Vice-President, Portfolio Manager and Co-Lead, Bluewater, will continue in his role as Strategist and Portfolio Manager across Bluewater strategies. David has 30 years of investment management experience, including 12 years spent working with Dina. David is the lead Portfolio Manager on U.S. and Global Equity mandates. The Bluewater team is rounded out by Vice-Presidents and Portfolio Managers Tyler Hewlett and Dave Taylor who will continue with the team in their current roles.

Dina will continue as Portfolio Manager of her funds until August 31, 2024.

IMR has placed all Bluewater mandates on watch, while we assess this leadership and portfolio manager change.

The funds' fee, investment objective and style remain unchanged, and no action is required.

Fund code	Fund name	Portfolio Managers prior to announcement	Portfolio Managers after the announcement
LCEGM	Canadian Core Growth (Mackenzie)	Dina DeGeer (Lead) Shah Kahn David Arpin Tyler Hewlett David Taylor	Shah Kahn (Lead) David Arpin Tyler Hewlett David Taylor
LEBG	Canadian Growth Balanced (Mackenzie)	Dina DeGeer (Lead) Shah Kahn David Arpin Tyler Hewlett David Taylor	Shah Kahn (Lead) David Arpin Tyler Hewlett David Taylor
LLUSE	U.S. Core Growth (Mackenzie)	Dina DeGeer David Arpin (Lead) Tyler Hewlett David Taylor	David Arpin (Lead) Tyler Hewlett David Taylor
LUSEG	U.S. Large Cap Equity (Mackenzie)	Dina DeGeer David Arpin (Lead) Tyler Hewlett David Taylor	David Arpin (Lead) Tyler Hewlett David Taylor

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LGEM	Global Growth (Mackenzie)	Dina DeGeer David Arpin (Lead) Tyler Hewlett David Taylor	David Arpin (Lead) Tyler Hewlett David Taylor
LLSTG	Science & Technology (Mackenzie)	Tyler Hewlett David Taylor	Tyler Hewlett David Taylor

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