

BMO ETF Portfolios & US Dollar ETF Portfolios Toolkit

**Resources & Tools
for Advisors**

**Resources & Tools
for your Clients**

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BMO Actively Managed ETF Solutions – F series



BMO ETF Portfolios Fact Sheet

Monthly BMO ETF Portfolios Commentary Kit

BMO ETF Portfolios: Investor Profile Questionnaire

BMO USD ETF Portfolios Portfolio Fact Sheet

BMO ETF Portfolios & BMO US Dollar ETF Portfolios Presentation

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[BMO GAM MAST Commentary Website](#)

Resources & Tools for your Clients

BMO ETF Portfolios Brochure

Helping you get more out of your investments.

Investment solutions designed to help you reach your financial goals.

BMO Global Asset Management

BMO GAM 5 Lenses Strategy

BMO's "Five Lenses" Strategy

BMO Multi-Asset Solutions Team

Lens 1: Equity
Key Influences: Global Equity, Emerging Markets, Dividend Growth, Value, Growth, Small Cap, Micro Cap, ESG, Sustainable

Lens 2: Fixed Income
Key Influences: Global, U.S. Government, U.S. Corporate, U.S. Municipal, U.S. High Yield, U.S. Structured, U.S. International

Lens 3: Global Equity
Key Influences: U.S. Equity, U.S. Fixed Income, U.S. International, U.S. Structured, U.S. High Yield, U.S. Micro Cap, U.S. Small Cap, U.S. Value, U.S. Growth, U.S. Dividend Growth, U.S. ESG, U.S. Sustainable

Lens 4: Global Equity
Key Influences: U.S. Equity, U.S. Fixed Income, U.S. International, U.S. Structured, U.S. High Yield, U.S. Micro Cap, U.S. Small Cap, U.S. Value, U.S. Growth, U.S. Dividend Growth, U.S. ESG, U.S. Sustainable

Lens 5: Global Equity
Key Influences: U.S. Equity, U.S. Fixed Income, U.S. International, U.S. Structured, U.S. High Yield, U.S. Micro Cap, U.S. Small Cap, U.S. Value, U.S. Growth, U.S. Dividend Growth, U.S. ESG, U.S. Sustainable

Benefits of Asset Allocation

Benefits of Asset Allocation

Overdiversification through asset classes: In investing, only one asset class you own risks out a potential gain.

Asset Class	2001	2006	2011	2016	2021	2026	2031	2036	2041
Global Equity	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Equity	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Fixed Income	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. International	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. High Yield	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Structured	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Micro Cap	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Small Cap	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Value	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Growth	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Dividend Growth	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. ESG	10%	10%	10%	10%	10%	10%	10%	10%	10%
U.S. Sustainable	10%	10%	10%	10%	10%	10%	10%	10%	10%

BMO Global Asset Management

Client Fund Facts

FUND FACTS

BMO Income ETF Portfolio Series A

Quick Facts: Fund Name, Inception Date, Assets Under Management, Expense Ratio, Dividend Yield, etc.

Investment Objectives: To provide long-term capital appreciation and income.

Investment Strategy: Global Equity, Global Fixed Income, Global Structured, Global High Yield, Global Micro Cap, Global Small Cap, Global Value, Global Growth, Global Dividend Growth, Global ESG, Global Sustainable.

Key Risks: Market Risk, Credit Risk, Liquidity Risk, etc.

Fund Profiles

BMO Balanced ETF Portfolio - Series F

Reasons to Invest in the Fund: Diversification, Global Exposure, etc.

Fund Details: Fund Name, Inception Date, Assets Under Management, Expense Ratio, Dividend Yield, etc.

Investment Objectives: To provide long-term capital appreciation and income.

Investment Strategy: Global Equity, Global Fixed Income, Global Structured, Global High Yield, Global Micro Cap, Global Small Cap, Global Value, Global Growth, Global Dividend Growth, Global ESG, Global Sustainable.

Key Risks: Market Risk, Credit Risk, Liquidity Risk, etc.

Factor Investing: Deep Dive into Lens 5

Factor Investing: Pension-Style Investing in your Portfolio

Factor Investing: What are Market Factors? Market factors can be described as a way to capture or explain certain characteristics of a certain group of assets.

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