

Dealer Relations

Upcoming fund events at Mackenzie Investments



We'd like to let you know about some Mackenzie fund events that will take effect on July 30, 2024.

Hard capping of three mutual funds

Last month, Mackenzie proposed [three mutual fund mergers](#) to streamline and strengthen its product shelf. In anticipation of the changes, Mackenzie soft-capped the following funds on June 20, 2024.

- Mackenzie Maximum Diversification All World Developed Index Fund
- Mackenzie Maximum Diversification Canada Index Fund
- Mackenzie Maximum Diversification US Index Fund

Please note that we'll be closing these funds to all new investments, including one-time and systematic purchases from existing investors, at **4:00 pm ET on July 29, 2024**.

In the coming weeks, we'll be reaching out to advisors who have clients with Mackenzie-administered systematic plans or investment instructions, to advise them of the hard capping and obtain new instructions. We also recommend that advisors review their clients' accounts for any dealer-administered systematic plans and update them accordingly.

Name change for Mackenzie Maximum Diversification Global Multi-Asset Fund

Please note that the Mackenzie Maximum Diversification Global Multi-Asset Fund will be renamed the Mackenzie Diversified Growth Fund, effective July 30, 2024.

The name is being changed to reflect the new investment strategy of the fund, which will be managed by the [Mackenzie Multi-Assets Strategy](#) team as of that date. The fund's investment objective remains the same.

Additional information and support

Details about both changes can be found [here](#). Additional information can be obtained from the FD file, available through Fundserv with an effective date of July 30.

Questions?

If you have questions or need additional information, please contact your Dealer Relations Account Manager directly or send an email to drelations@mackenzieinvestments.com.

Thank you for your continued support of Mackenzie Investments.

The Dealer Relations Team

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