

A whole world of opportunity

Available in one portfolio

BMO GAM Global Equity Sector Neutral Portfolio

Global equities offer the benefits of diversification, increased potential for alpha generation, and exposure to sectors, companies, and trends that may be unavailable domestically. Now, you can access our 20-person Global Equity team's best global sector ideas in a single mandate.

The BMO GAM Global Equity Sector Neutral Portfolio aims to generate **long-term returns** by investing in a basket of high conviction global equities (approx. 50–60 holdings¹). Rather than make sector bets, the portfolio will maintain benchmark-like² exposure in terms of Global Industry Classification Standard (GICS) sectors, but differentiates itself through fundamental stock selection within each sector.

The **BMO GAM Global Equity portfolio management team**, comprised of global sector specialists, selects companies for the portfolio based on comprehensive research and extensive knowledge of the drivers of performance in each sector.

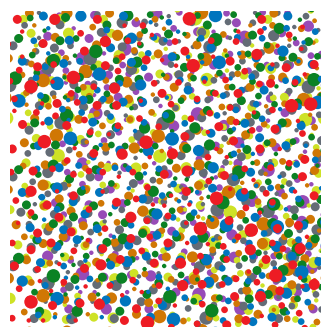
Key features

- Global sector specialists
- Exposure to high conviction global equities
- No sector bets
- No style bias
- Regular rebalancing for sector weights
- Decentralized decision-making
- 50% maximum annual turnover

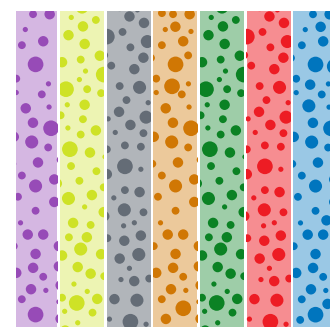
Making sense of the Global Equity universe

“The way our process works is that rather than looking at the global equity universe through styles or regions, we **split up the world by sectors**. The key to this unique sector model is trust—you have to believe in your colleague's ability to pick stocks, adapt styles and generate alpha.”

– Jeff Elliott, Head of Global Equity



Global Equity universe



Global Equity—divided by sector

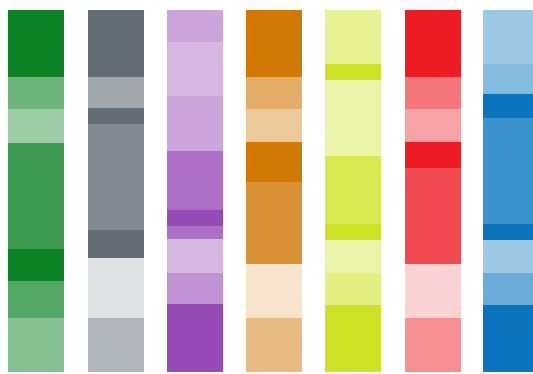
The Global Equity challenge

The global equity universe can seem daunting, with over **12,000 stocks, 11 GICS sectors** (including 24 industry groups, 69 industries, and 158 sub-industries), and more than **\$100 trillion** in market capitalization.

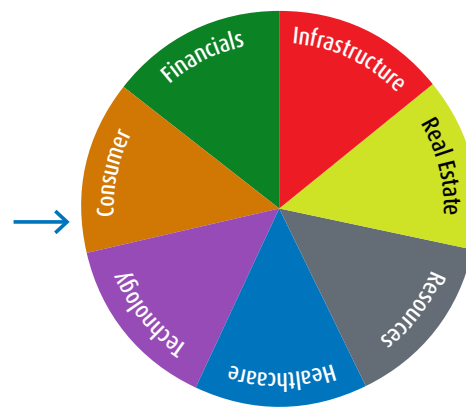
BMO GAM's 20-person Global Equity Team has the **experience** to make sense of the global equity universe AND the **full stock-picking authority** to capitalize when they identify an opportunity.

Rather than taking a style or region-based approach to the global equity universe, the Global Equity Team divides up the world by sector. Through this comprehensive strategy, each team member is empowered to develop true expertise over their own domain, with the team members' best sector ideas coming together to form the core of our global portfolio.

The team's deep industry and corporate relationships and advanced insights into industry trends—including supply chains, patents, and regulatory environments—allow them to identify superior investment opportunities and stay ahead of the curve.



Our sector best ideas



Optimized portfolio



If you don't go, you don't know

Travel is an essential part of maintaining corporate relationships and identifying investment opportunities (and pitfalls). Since the pandemic, our Global Equity portfolio managers have visited:

- Healthcare**  Switzerland, Denmark, Belgium, France, U.K., U.S.
- Infrastructure**  China, Japan, Spain, Italy, U.K., U.S., Germany
- Technology**  South Korea, Japan, Taiwan, U.K., U.S., Hong Kong
- Resources**  China, Chile
- Consumer**  France, U.S.
- Financials**  U.K., U.S., Hong Kong, Indonesia, Bermuda

Performance (as of February 28, 2026)

	1-month	3-month	6-month	Year-to-date	1-year	Since inception
BMO GAM Global Equity Sector Neutral Portfolio	-0.7%	4.5%	11.7%	3.4%	26.8%	20.8%
MSCI World Index	0.7%	3.8%	9.6%	3.0%	21.3%	18.3%

Source: StateStreet; portfolio inception date: June 24, 2024.

Top holdings (as of February 28, 2026)

Name	Weight
1. NVIDIA CORPORATION	7.0%
2. MICRON TECHNOLOGY INC	3.8%
3. TAIWAN SEMICONDUCTOR-SP ADR	3.6%
4. EAST WEST BANCORP INC	3.0%
5. AMAZON.COM INC	2.9%
6. APPLE INC	2.9%
7. WALMART INC	2.9%
8. ALPHABET INC-CL A	2.9%
9. PARKER HANNIFIN CORP	2.6%
10. META PLATFORMS INC - CLASS A	2.4%

The portfolio holdings are subject to change without notice and only represent a small percentage of portfolio holdings. They are not recommendations to buy or sell any particular security.

Meet the Global Equity team

REIT

Resources

Financials

Technology

Infrastructure

Consumer

Healthcare



Kate MacDonald,
CFA, MFin
Portfolio Manager



Hoa Hong,
CFA, MBA
Portfolio Manager



John Hadwen,
CFA
Portfolio Manager



Malcolm White,
CFA
Portfolio Manager



Jeremy Yeung,
CFA
Portfolio Manager



Massimo Bonansinga, MBA
Portfolio Manager



Ashley Bussin,
CFA
Associate
Portfolio Manager



Jeff Elliott, PhD,
CFA, MBA
Head of Global
Equity, Portfolio
Manager
(Healthcare)

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¹ As of February 2026. Subject to change without notice.

² Benchmark: MSCI World Index.

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