



April 1<sup>st</sup>, 2024

Please be advised of the following category changes resulting from the Canadian Investment Funds Standards Committee’s quarterly review. The changes are based on data up to December 31<sup>st</sup>, 2023 and will be reflected in the release of March 2024 month-end data.

If you require further information, please contact Danielle LeClair, Chair of CIFSC, at (416) 428-9873 or by email at [danielle.leclair@morningstar.com](mailto:danielle.leclair@morningstar.com).

Fund Name	Previous Category	New Category
BMO Emerging Markets Bond Hedged to CAD Index ETF (ZEF)	High Yield Fixed Income	Emerging Markets Debt
Canada Life Canadian Small-Mid Cap	Canadian Focused Small/Mid Cap Equity	Canadian Small/Mid Cap Equity
DFA Global Sustainability Core Equity Fund	Global Small/Mid Cap Equity	Global Equity
Great West Life Canadian Small-Mid Cap	Canadian Focused Small/Mid Cap Equity	Canadian Small/Mid Cap Equity
Guy Cote Team Dividend Plus Equity Private Portfolio	Canadian Dividend & Income Equity	Canadian Focused Equity
London Life Canadian Small-Mid Cap	Canadian Focused Small/Mid Cap Equity	Canadian Small/Mid Cap Equity
NBI Private Equity Master Pooled Fund	Global Equity	Alternative Private Equity
PH&N Enhanced Long Bond Pension Trust	Canadian Fixed Income	Canadian Long Term Fixed Income
Quintessence Wealth Enhanced Global Yield Fund	Alternative Credit Focused	Alternative Credit Focused
SIA ML Global Tactical Pool	Global Equity	Alternative Equity Focused