



February 8<sup>th</sup>, 2022

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>, 2021 and will be reflected in the release of January 2022 month-end data.

If you require further information, please contact Ian Tam, Chair of CIFSC, at (416) 484-7920 or by email at [Ian.Tam@Morningstar.com](mailto:Ian.Tam@Morningstar.com).

<b>Fund Name</b>	<b>Previous Category</b>	<b>New Category</b>
Brandes Global Opportunities Fund	Global Equity	Global Small/Mid Cap Equity
CAN Canadian Tactical Bond	Global Fixed Income	Canadian Fixed Income
Meritage Growth Income Portfolio	Canadian Neutral Balanced	Canadian Equity Balanced
NBI Non-Traditional Capital Appreciation Private Portfolio	Global Equity Balanced	Global Equity