



August 1st, 2023

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 March 31st, 2023 and will be reflected in the release of July 2023 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.

Fund Name	Previous Category	New Category
BMO SDG Engagement Global Equity Fund	Global Equity	Global Small/Mid Cap Equity
CI Canadian Balanced Corporate Class	Canadian Neutral Balanced	Canadian Equity Balanced
CI Canadian Balanced Fund	Canadian Neutral Balanced	Canadian Equity Balanced
CIBC Balanced Index Fund	Canadian Fixed Income Balanced	Canadian Neutral Balanced
Exemplar Growth and Income Fund	Canadian Equity Balanced	Tactical Balanced
Horizons Active ESG Corporate Bond ETF (HAEB)	Global Corporate Fixed Income	Canadian Corporate Fixed Income
Manulife National Bank Bundle GIF	Canadian Equity Balanced	Global Equity Balanced
Manulife RetirementPlus CI Canadian Balanced	Canadian Neutral Balanced	Canadian Equity Balanced
PH&N Short Investment Grade Corporate Bond Trust	Canadian Fixed Income	Canadian Short Term Fixed Income
RBC Target 2025 Corporate Bond Index ETF (RQN)	Canadian Corporate Fixed Income	Canadian Short Term Fixed Income
TWM Canadian Equity Private Pool	North American Equity	Canadian Equity
United Canadian Equity Growth Corporate Class	Canadian Focused Small/Mid Cap Equity	Canadian Focused Equity
United Canadian Equity Growth Pool	Canadian Focused Small/Mid Cap Equity	Canadian Focused Equity