

Meet the managers



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AlphaFixe Capital Inc.



Founded in May 2008, AlphaFixe Capital Inc. (“AlphaFixe”) is an independent Canadian-based investment management firm specializing in fixed income and servicing an institutional clientele. The firm’s investment philosophy was greatly influenced by the events of the 2008 financial crisis and is therefore based on a rigorous risk management process which includes the full integration of environmental, social and governance (ESG) factors. The firm is wholly owned by its investment professionals and manages over CAD\$15 billion in assets on behalf of its clients.

Baillie Gifford Overseas Limited



Baillie Gifford is one of the UK’s oldest independent investment management firms. The firm was established in 1908. The firm is wholly owned by its investment professionals through a partnership structure. The firm currently has over 50 partners. Baillie Gifford manages over CAD\$380 billion in assets on behalf of its clients worldwide.

Baillie Gifford is a long-term active investor, and their investment philosophy focuses on growth.

As a sizable investor in many companies, Baillie Gifford acts as a responsible owner. They encourage companies to conduct themselves in a way that generates long-term investment returns but also contributes to improving living standards and wealth creation.

Beutel, Goodman & Company Ltd.



Established in 1967, Beutel, Goodman & Company Ltd. (“Beutel”) is a privately owned Canadian investment manager. The firm is majority owned by its investment professionals, with Affiliated Managers Group Inc. (AMG), a U.S.-based investment holding company, holding a minority position. Beutel manages over CAD\$40 billion in assets on behalf of its clients.

Beutel uses a fundamental bottom-up value investment philosophy grounded in a disciplined research process. BG’s investment teams focus on capital preservation, absolute risk reduction and downside protection in declining markets.

BlackRock Asset Management Canada Ltd.



BlackRock Asset Management Canada (BlackRock) is owned by its parent company BlackRock Inc., a U.S.-based publicly traded company established in 1988. BlackRock provides investment management, risk management, technology and advisory services for institutional and retail clients worldwide. The firm offers products that span the risk spectrum including active, enhanced and index strategies across markets and asset classes. Blackrock Asset Management Canada manages over CAD\$320 billion in assets on behalf of its clients.

Boston Partners Global Investors, Inc.



Boston Partners Global Investors, Inc. (Boston Partners) is an asset manager with a distinctive approach to investing—one that combines attractive valuation characteristics with strong business fundamentals and positive business momentum. The consistent application of this approach over nearly 30 years by an experienced and long-tenured team has created a proven record of performance across economic cycles, market capitalizations, and geographies. Boston Partners manages approximately CAD\$140 billion for clients worldwide.

Capital International Asset Management (Canada), Inc.



Capital International Asset Management (Canada), Inc. is the Canadian affiliate of The Capital Group Companies, Inc. (Capital Group). Capital Group was formed in 1931 in Los Angeles, California. A privately held company, Capital Group manages over USD\$2 trillion in assets globally and has offices located worldwide. Capital Group offers clients investment solutions in equities, fixed income and multi-asset class portfolios.

Capital Group believes that deep fundamental research and a long-term view of investments creates success. Their unique portfolio construction approach combines high-conviction investment ideas from the diverse perspectives of multiple portfolio managers to create a single well-diversified portfolio.

Connor, Clark & Lunn Investment Management Ltd.



Connor, Clark & Lunn Investment Management Ltd. (CC&L) is one of the largest independently owned investment management firms in Canada with over CAD\$70 billion in assets under management. CC&L ownership is comprised of over 40 entrepreneurial investment professionals focused on delivering both traditional and innovative solutions to its clients.

CC&L was founded by Larry Lunn in 1982 and has been owned and controlled by its key employees since inception. The genesis of the firm's business specialized in Canadian equities, fixed income, and balanced strategies. In 2000, CC&L began independently managing quantitative equity strategies.

Fidelity Investments Canada ULC



Fidelity Investments Canada ULC (FIC) is part of Fidelity Investments, a privately-owned financial services firm established in Boston in 1946. FIC provides Canadian investors with domestic, international and global equity and income-oriented strategies, as well as asset allocation, managed solutions and exchange-traded funds. FIC manages approximately CAD\$250 billion in assets on behalf of its clients.

Fiera Capital Corporation



Fiera Capital Corporation ("Fiera") is an independent asset management firm with a global presence that manages approximately CAD\$160 billion in assets under management. Founded in 2003 and headquartered in Montreal, Fiera delivers multi-asset solutions across public and private market asset classes to institutional, financial intermediary and private wealth clients across North America, Europe and Asia.

Fiera recognizes that the investment landscape is constantly evolving. Its teams collaborate and seek to draw on the global industry's most innovative and diverse offerings to craft strategies that meet the needs of every client, anywhere in the world.

Franklin Templeton Investments Corp.



Franklin Templeton is a global investment management organization serving clients in over 150 countries. With offices in more than 30 countries and approximately 1,500 investment professionals, the California-based company has 75 years of investment experience and over USD\$1.4 trillion in assets under management. The firm brings extensive capabilities in equity, fixed income, multi-asset solutions and alternatives. The investment teams are backed by global resources for analytics, sustainable investing capabilities, and risk management.

Global Alpha Capital Management Ltd.



Global Alpha Capital Management Ltd. (Global Alpha) is an independent and privately owned investment management firm focused exclusively on global, international, and emerging markets small cap portfolio management. In the search for companies with unrecognized growth potential, Global Alpha uses various screening methodologies across global databases to identify those companies that offer strong financial productivity, a historical pattern of earnings growth, and management teams with a significant ownership stake.

Bottom-up fundamental approach combines with management interviews to identify companies with features such as sustainable competitive advantages, clearly defined growth strategies, and a strong balance sheet.

Global Alpha manages over CAD\$9 billion in assets on behalf of its clients.

Global Alpha is part of the Connor, Clark & Lunn Financial Group Ltd., a multi-boutique investment management company whose affiliates collectively manage over \$120 billion in assets.

IFM Investors



IFM Investors is one of the largest infrastructure managers in the world. IFM Investors is owned by Australian pension funds - a distinct ownership structure that aligns the interests of the firm's owners with those of the investors. The firm manages assets across Infrastructure, Debt Investments, Listed Equities and Private Equity.

IFM Investors has invested in infrastructure on behalf of institutional investors since 1995. The firm has also acquired and managed global infrastructure assets since 2004. IFM Investors has offices in Australia, North America, Europe and Asia. IFM manages over CAD\$145 billion assets on behalf of its clients.

Invesco Ltd.



Invesco Ltd. is a global independent investment management firm dedicated to delivering an investment experience that helps people get more out of life. Their investment teams deliver a wide range of active, passive and alternative investment capabilities. With offices in more than 20 countries, Invesco Ltd. managed CAD\$2 trillion in assets on behalf of clients worldwide.

Jarislowsky, Fraser Limited



Jarislowsky, Fraser Limited (Jarislowsky Fraser) is a Canadian investment management firm founded in 1955 and headquartered in Montreal, Quebec. In 2018, Jarislowsky Fraser became a wholly-owned subsidiary of The Bank of Nova Scotia. The firm manages over CAD\$50 billion in assets across Canadian equities, foreign equities, fixed income, and balanced portfolios.

Jarislowsky Fraser's investment philosophy is rooted in a disciplined, team-based approach and expressed in an adherence to higher-quality investing, fundamental research, a long-term investment horizon, and the advancement of good governance and sustainable investing. The firm believes that superior long-term performance is achieved by investing in high-quality businesses with attractive earnings prospects and reasonable valuations.

Lazard Asset Management LLC



Lazard Asset Management LLC (Lazard) is a global investment management firm operating in 18 countries around the world. Lazard is a subsidiary of Lazard & Freres Co. and part of Lazard Ltd., a publicly traded entity listed on the New York Stock Exchange. Lazard has been managing money since 1970 and can trace its roots back to 1848. Lazard provides investment advisory and asset management services for institutional and retail clients worldwide across a wide range of asset classes. They manage approximately USD\$200 billion in assets on behalf of their clients.

Mawer Investment Management Ltd.



Mawer Investment Management Ltd. (Mawer) is a privately owned investment firm that has been managing assets for individual and institutional investors for over 49 years. Based in Canada, Mawer has a presence in Calgary, Toronto, the U.S., and Singapore and manages over CAD\$90 billion in assets.

Mawer manages money in Canadian equities, foreign equities, fixed income and balanced mandates. They take a long-term view of the markets and believes in sticking to a systematic, disciplined, bottom-up investment approach to investing no matter the market outlook. Their equity investment philosophy focuses on investing in wealth-creating companies with a sustainable competitive advantage, excellent management teams, and that are trading at a discount to their intrinsic value.

Morgan Stanley Investment Management



Established in 1975, Morgan Stanley Investment Management (Morgan Stanley) manages USD\$1.5 trillion in assets, for a diverse client base that includes governments, institutions, corporations, and individuals worldwide. Their core investment capabilities include High-Conviction Equities, Active Fixed Income & Liquidity, Alternative Investments and Custom Solutions.

In Canada, Morgan Stanley manages over CAD\$10 billion in assets on behalf of clients.

Phillips, Hager & North Investment Management Ltd.



PH&N Institutional was founded in 1964. The firm was a privately held entity until 2008 when Royal Bank of Canada (RBC) acquired the firm. In 2010, the firm was amalgamated with RBC Asset Management Inc. to form RBC Global Asset Management Inc. (RBC GAM Inc.), an indirect, wholly-owned subsidiary of RBC. PH&N Institutional serves Canadian institutional investors as a business division of RBC GAM Inc. PH&N manages approximately CAD\$140 billion in assets on behalf of its clients.

PineStone Asset Management



PineStone Asset Management ("PineStone") is a 100% employee-owned and founder-led specialist global equity manager. Founded in 2021 and based in Montreal, QC, PineStone manages high-conviction, low-turnover portfolios investing in what they believe to be the highest-quality companies worldwide. It is their opinion these "quality compounders" can generate superior shareholder value for their clients over the long term. PineStone manages over CAD\$70 billion on behalf of its clients.



PIMCO is a global investment management firm based in California with offices in 16 countries throughout the Americas, Europe and Asia. Founded in 1971, PIMCO manages over USD\$1.8 trillion in assets, primarily in active fixed income strategies, but also including equities, alternatives and asset allocation strategies. PIMCO is owned by Allianz S.E., a global diversified financial services company.

PIMCO believes that investment decision-making is a team effort and draws upon the skills and insights of portfolio managers and analysts around the globe. Their investment process incorporates "top-down" macroeconomic views and "bottom-up" security analysis to target the most attractive opportunities for client portfolios.

Schroder Investment Management North America Inc.



Schroder Investment Management North America is a subsidiary of Schroders plc ("Schroders"), a publicly traded global asset management company. Founded in 1804 and based in London, England, Schroders plc manages assets on behalf of institutional and private investors from around the world. The firm manages investments across a broad range of asset classes including equities, fixed income, multi-asset and alternatives. Schroders operates from 40 locations in countries across Europe, the Americas, Asia, the Middle East and Africa with over USD\$800 billion in assets under management.

State Street Global Advisors, Ltd.



State Street Global Advisors, Ltd. (SSGA) is the investment management arm of State Street Corporation. SSGA was established in 1978 and headquartered in Boston, Massachusetts. SSGA manages more than USD\$4 trillion in assets with a focus on quantitative strategies, including indexing.

T. Rowe Price Group, Inc.



Founded in 1937, U.S.-based T. Rowe Price Group, Inc. (T. Rowe Price) is a global investment management organization with over USD\$1.5 trillion in assets and offices in 16 countries. T. Rowe Price offers a broad range of equity, fixed income and asset allocation solutions.

T. Rowe Price's investment approach is characterized by independent thinking and rigorous global research. The firm's investment professionals work together across regions, sectors, and asset classes to find attractive investment opportunities. The firm has over 900 investment professionals.

TD Asset Management Inc.



TD Asset Management Inc. ("TDAM") is a wholly-owned subsidiary of The Toronto-Dominion Bank, and a member of the TD Bank Financial Group. TDAM brings together three decades of experience and has a long track record of helping clients meet their investment goals. The firm manages a broad range of strategies, including active and passive equity and fixed income, as well as alternative assets such as private credit, infrastructure and real estate. The firm offers investment solutions to corporations, pension plans, endowments and foundations, insurance companies, sovereign wealth funds, and superannuation. The firm oversees over CAD\$400 billion of investments.

Sun Life Financial group of companies

BentallGreenOak



BentallGreenOak (“BGO”) is a global real estate investment manager and provider of real estate services. BGO serves more than 750 institutional clients with over USD\$80 billion of assets under management and expertise in the management of office, industrial, multi-residential, retail and hospitality properties across the globe. BGO has offices in 27 cities across 13 countries with deep, local knowledge, experience, and extensive networks. BGO is a part of SLC Management, which is the asset management business of Sun Life.

MFS Investment Management Canada Ltd.



Founded in 1924, MFS Investment Management (“MFS”) is a global investment manager with capabilities spanning equity, fixed income, and multi-asset strategies serving institutional and individual investors worldwide. Today, MFS manages over USD\$500 billion in assets and serves investors in more than 75 countries through offices in nine major financial centers – Boston, Hong Kong, London, Luxemburg, Sao Paulo, Singapore, Sydney, Toronto and Tokyo. MFS is majority owned by Sun Life. For nearly a century, MFS has aligned its active investment approach and how it serves clients with a sole purpose: to create long-term value responsibly. Through its global investment platform, MFS combines collective expertise, thoughtful risk management and long-term discipline to uncover best investment opportunities. MFS Investment Management Canada Ltd. is a subsidiary of MFS.

SLC Management



Sun Life Capital Management (Canada) is the Canadian division of SLC Management, Sun Life’s global institutional asset manager that offers institutional investors traditional, alternative and yield-oriented investment solutions across public and private fixed income markets. In addition to the traditional fixed income, SLC Management also offers specialty fixed income, global real estate, and infrastructure solutions. SLC offer these solutions through three divisions: Crescent Capital Group, Bentall GreenOak, and InfraRed Capital Partners.

SLC Management has total assets under management of over CAD\$350 billion.

SLGI Asset Management Inc.



SLGI Asset Management Inc. (“SLGI”) was established to combine the strength of Sun Life with some of the best asset managers in the world. SLGI manages over CAD\$35 billion across diverse strategies, including over \$10 billion in their flagship Sun Life Granite Target Date Funds. SLGI’s investment team focuses on a clear process to build portfolios that derive performance from many sources:

- Open architecture— the ability to invest across any manager, asset class and region.
- Broad diversification—including specialty equity and fixed income.
- Strategic blend of active and passive strategies as active and passive complement each other.
- ESG integration because factors such as regulatory change, climate risk and corporate responsibility can have a material impact on an investment’s performance.
- Tactical asset allocation to reduce risk or take advantage of opportunities.