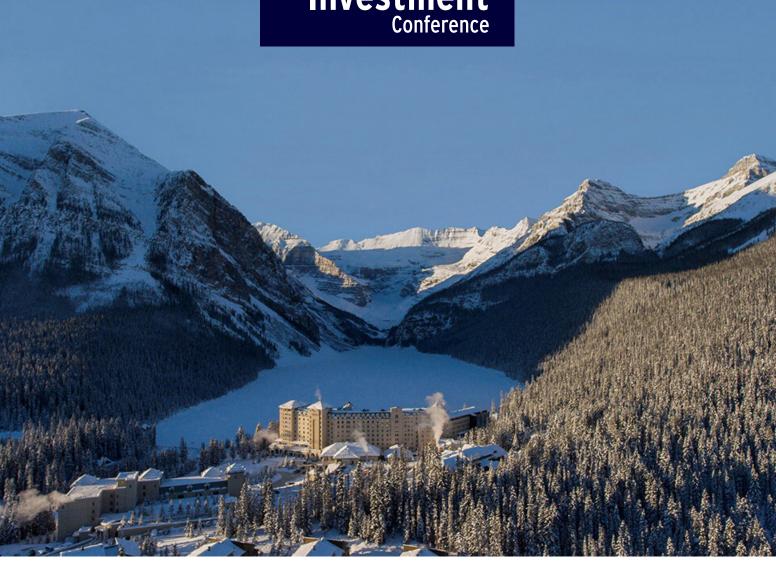
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APRIL 5-7, 2022

Fairmont Chateau Lake Louise Lake Louise, Alberta





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Global Investment Conference

April 5, 2022		
4:00 PM:	CHECK-IN TO HOTEL	
4:30 - 5:30 PM:	SPEAKER REHEARSAL (Victoria Ballroom)	
6:00 - 9:00 PM:	OPENING COCKTAILS AND DINNER (Victoria Foyer and Sun Room)	
April 6, 2022		
7:00 - 8:30 AM:	BREAKFAST (Fairview Bar and Restaurant)	
8:30 - 8:45 AM:	OPENING REMARKS AND ICEBREAKER ACTIVITY (Victoria Ballroom)	
8:45 - 9:45 AM:	NAVIGATING THE WINDS OF GLOBAL CHANGE	
	The fall of the Berlin Wall did not bring about the end to history. With the world's digitalization, globalization and warming, the apparently boundless spread of liberty, democracy and cross-cultural fraternity slowed and is being reversed. As a new Cold War dawns, institutional investors must revisit the lessons of the past to prepare for the perils of the future.	
	SPEAKER: Rt. Hon. Joe Clark, former Prime Minister of Canada	
9:45 - 10:15 AM:	RIDING GROWTH WAVES	
	Elbert Hubbard said, "the world is moving so fast that the person who says it can't be done is generally interrupted by someone doing it."	
	Join Joe Faraday, director in Baillie Gifford's international equities specialists team, as he explores research into innovation and the rapid rise of new industries and technologies. While some businesses endure, evolve and continue to be extremely successful with time, others will be superseded by the next big wave of innovation and driver of growth and advancement. In this session, Faraday will reveal the steps you can take to research these innovative companies and build portfolios from the bottom-up, uncovering how key clusters of certain companies could have outsized effects on economic growth and development.	
	SPEAKER:	
	Joe Faraday, director, international equities specialists team, Baillie Gifford	
10:15 - 10:45 AM:	NETWORKING BREAK (Victoria Foyer)	
10:45 - 11:15 AM:	THE FUTURE OF ASSET ALLOCATION AND DIGITAL ASSETS	
	The prospect of higher inflation is one of the key macro forces that is likely to act on markets and drive reallocation of portfolios in coming years. Canadian pensions will not only need to seek return streams that work as inflation rises but also maintain diversification. Inigo Fraser Jenkins, co-head of institutional solutions at AllianceBernstein, will examine these issues in addition to falling Sharpe ratios across asset classes and the need to increase allocations to real assets and equities as well as address the question whether cryptocurrencies and real assets tokenized on the blockchain can help from a return and diversification perspective. SPEAKER: Inigo Fraser Jenkins, co-head of institutional solutions, AllianceBernstein	





11:15 - 11:45 AM:	FIXED INCOME 2022: A WORLD UPENDED	
	Against the backdrop of events in the Ukraine and Russia, governments are imposing restrictions while central banks have been removing COVID created accommodations. As a result, markets are experiencing tighter liquidity conditions, higher volatility, higher interest rates and changing bond-equity correlations. Is your portfolio ready? Join Andrew McCormick, global head of fixed income and chief information officer at T. Rowe Price, as he discusses a fresh approach to these issues, highlighting the importance of bold active duratior management and creative ways to help preserve capital and diversify.	
	SPEAKERS: Samantha Cleyn , vice-president, head of eastern Canada, T. Rowe Price Andrew McCormick , head of global fixed income and chief investment officer, T. Rowe Price	
11:45 AM - 12:45 PM:	LUNCH (Victoria Ballroom)	
12:45 - 1:15 PM:	PEER-TO-PEER ROUNDTABLE ACTIVITY	
1:15 - 1:45 PM:	LOW VOLATILITY INVESTING - A CLOSER LOOK AT FINANCE THEORY VERSUS Empirical reality	
	In this session, Ben Treacy, institutional portfolio manager at Fidelity Investments, will take a deeper dive into the low volatility anomaly and explore the empirical evidence behind why low volatility equity portfolios have shown to outperform traditional cap-weighted equity portfolios over full market cycles with lower portfolio risk. He will also discuss how incorporating low volatility equities into a broader equity portfolio can improve efficiency and how fundamental research can aid in the management of low volatility strategies.	
	SPEAKER: Benjamin D. Treacy , institutional portfolio manager, Fidelity Investments	
1:45 - 2:15 PM:	PRIVATE MARKET ALLOCATIONS: THEORY VS. REALITY	
	An increasing number of institutional investors are seeking access to private market investments to help achieve long-term return objectives. While private equity, real estate and debt may offer opportunities for enhanced returns, there are some common misunderstandings and assumptions about allocating to private markets that can cause problems for investors. This session attempts to provide some practical, real-world solutions to these challenges.	
	SPEAKER: Wylie Tollette , executive vice-president, head of client investment solutions, Franklin Templeton Investment Solutions Franklin Advisers, Inc.	
2:15 - 2:45 PM:	NETWORKING BREAK (Victoria Foyer)	
2:45 - 3:15 PM:	AN ALTERNATIVE TO THE COLLECTIVE HYSTERIA IN PRIVATE MARKETS	
	Many Canadian pension plans have increased their allocations to private markets in response to the consensus view that conventional liquid allocations will underperform in the near term. However, a modestly levered basket of stocks, commodities and bonds can be used to seek high returns and remain totally liquid. For investors who need to maintain some liquid assets and can't afford to have them earn two to four per cent in real terms, risk balanced portfolios are an invaluable tool in a challenging and uncertain environment.	
	SPEAKER:	





3:15 - 3:45 PM:	DEFI IN DEPTH: REGULATORY HURDLES AHEAD		
	While some private investors are making use of innovative decentralized financial instruments major hurdles prevent most established financial sector organizations from engaging with the emerging technology. In this session, Dr. Ryan Clements will discuss the regulatory barriers preventing institutional investors from fully benefitting from the opportunities presented by decentralized finance technology.		
	SPEAKER: Ryan Clements , assistant professor, chair in business law and regulation, Faculty of Law, University of Calgary		
6:00 - 9:00 PM:	COCKTAILS AND DINNER (Fairview Bar and Restaurant)		
April 7, 2022			
7:00 - 8:30 AM:	BREAKFAST (Fairview Bar and Restaurant)		
8:30 - 9:00 AM:	PEER-TO-PEER ROUNDTABLE ACTIVITY (Victoria Ballroom)		
9:00 - 9:30 AM:	WHY CANADA'S TOP PENSION PLANS STAND OUT ON THE GLOBAL STAGE		
	Sebastien Betermier, associate professor of finance at the Desautels Faculty of Management at McGill University, has spent his career seeking to understand how investor's decisions have contributed to the development of a sustainable pension system in Canada. In this session, he will share his findings on Canadian public sector pensions and why they have been so successful over the past guarter-century.		
	SPEAKER:		
	Sebastien Betermier , associate professor of finance, Desautels Faculty of Management, McGill University		
9:30 - 10:00 AM:	EMERGING MARKETS DEBT, A CANADIAN PERSPECTIVE		
	Emerging markets investing is familiar to Canadian investors, yet emerging market debt is still underrepresented across portfolios. EMD has matured significantly as an asset class over the past two decades. Today, many EMD issuers have robust fundamental profiles and are of a higher credit quality than in the past. This session will look at the long-term diversification benefits of a strategic allocation to EMD from a Canadian investor perspective. With recent events, we will also discuss how risk-off volatile markets create opportunities for active investment managers and where we find value.		
	SPEAKER: Ward Brown , fixed income portfolio manager, MFS Investment Management		
10:00 - 10:30 AM:	NETWORKING BREAK (Victoria Foyer)		





10:30 - 11:00 AM:	HOW TO BUILD A PERFORMING AND DIVERSIFIED PRIVATE MARKET PROGRAM	
	As a percentage of their total assets, Canada's largest public sector pension plans make larger private market allocations than their global peers. As private markets offer the opportunity to enhance returns and mitigate risk, this strategy is paying off. Smaller plans replicating their approach will encounter significant barriers, as making the best use of private markets requires size and expertise across a diverse range of asset classes. Join this session for a discussion on a strategy that helps overcome these barriers with expertise, opportunistic investment philosophy and diversification among asset classes, geographies and vintages.	
	SPEAKER: Tarik Serri , senior director, hedge funds and alternative investments, Trans-Canada Capital Inc.	
11:00 - 11:30 AM:	PLAN SPONSOR CASE STUDY: A FIRESIDE CHAT ON DEI	
	While the moral argument for diversity, equity and inclusion may be gaining traction, the business case isn't as widely understood. In this session, Sunita Mahant, head of global initiatives, diversity, equity and inclusion at Ivanhoé Cambridge, will explain why failing to consider diversity, equity and inclusion can affect the bottom line.	
	SPEAKER: Sunita Mahant , head of global initiatives, diversity, equity and inclusion, Ivanhoé Cambridge, the real estate wing of the Caisse de dépôt et placement du Québec	
11:30 AM - 12:15 PM:	PLAN SPONSOR PANEL: ESG	
	In the face of fast-growing commitments to carbon neutrality, fiduciaries must address the risks of large carbon footprints in their portfolios. Public discussions centre on equities, but private high carbon assets such as pipelines and office buildings are also an issue behind closed doors. What's the Canadian experience on engagement on the public side or retrofitting on the private side? Is there really evidence of a "brownium" developing in equity, bond and private markets or is this just hype? Are changes such as mandatory TCFD reporting making brown asset discounts inevitable? Join Catherine Ann Marshall, principal consultant at RealAlts, as she moderates a panel of ESG experts and institutional investors to bring a pragmatic perspective to issues around stewardship and divestment.	
	PANELLISTS: Serge Germain, general manager, pension committee, University of Sherbrooke Adam Goehner, senior manager, ESG strategy and risk, investment strategy and risk, British Columbia Investment Management Corp. Chris Powell, director of infrastructure and timber investments, Alberta Investment Management Corp.	
	MODERATOR:	
	Catherine Ann Marshall, principal consultant, RealAlts Inc.	
12:15 - 1:15 PM:	Catherine Ann Marshall, principal consultant, RealAlts Inc. LUNCH (Victoria Ballroom)	





ATTENDEES



Global Investment Conference

First Name	Last Name	Title	Company
Robert	Andrews	Chief Executive Officer	Union Benefits
Steven	Arts	Vice-President	AllianceBernstein
Rodney	Babineau	Senior Leader, Investments	City of Calgary
Frederic	Bessette	Director, Total Rewards	Canfor Corporation
Sebastien	Betermier	Associate Professor of Finance	McGill University, Desautels Faculty of Management
Thak	Bhola	Manager, Pension, Investments and Administration	Goodyear Canada Inc.
Ward	Brown	Portfolio Manager	MFS Investment Management
Julie	Caron	Senior Vice-President, Institutional Investments	Franklin Templeton
Joe	Clark	Right Honourable	former Prime Minister of Canada
Ryan	Clements	Assistant Professor, Chair Business Law and Regulation	University of Calgary
Samantha	Cleyn	Head of Eastern Canada	T. Rowe Price
Orla	Cousineau	Executive Director Pensions	UBC
Roberto	Croce	Head of Liquid Alternatives	BNY Mellon, Newton Investment Management Group
Tyler	Downey	Board Chair and Trustee	SEIU Healthcare Canada
Joe	Faraday	Director	Baillie Gifford
Jonathan	Flegg	Institutional Sales	T. Rowe Price
Gustavo	Fontanella	Director, Treasury & Pension Assets Strategy	Vale Canada Limited
Francois	Forget	Head of Distribution	Pictet Asset Management
Andrew	Forsyth	Senior Vice-President, Institutional	Franklin Templeton
Kevin	Francotte	Pension Analyst	Toromont Industries Ltd.
Inigo	Fraser Jenkins	Senior Vice-President & Managing Director, Co- Head, Institutional Solutions	AllianceBernstein
Paul	Frecon	Senior Treasury Advisor	Suncor
Lauren	Frosst	Director, Investments	Calgary Foundation
Serge	Germain	General Manager, Pension Plan	Université de Sherbrooke
Adam	Goehner	Senior Manager, ESG Strategy and Risk	British Columbia Investment Management Corp.
Emilian	Groch	Director	Calgary Firefighters Supplementary Pension Plan/ PSPP Corporation
Mathieu	Hebert	Treasurer	Transcontinental Inc.
François	Hudon	Senior Director, Financial Strategies and Operations	Desjardins
Gary	Hutch	Executive Director, Investment Services	PEBA
Richard	lwuc	Portfolio Manager	University of Alberta
Tom	Keenleyside	Associate Director, Investments	The University of Western Ontario
Rahul	Khasgiwale	Vice-President, Client Solutions	Trans-Canada Capital Inc.
Peter	Klein	Professor	Beedie School of Business, SFU
Steve	Lemelin	Pension Fund Investment Manager	City of Montreal
Linda	Li	Senior Analyst, Treasury & Investor Relations	Finning International Inc.
Sunita	Mahant	Head of Global Initiatives, Diversity, Equity and Inclusion / Sr. Director, Legal, Investment Management	Ivanhoé Cambridge

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First Name	Last Name	Title	Company
Alain	Malaket	Chief Executive Officer	InBenefits
Yasir	Mallick	Senior Portfolio Manager	UBC Investment Management Trust
Catherine Ann	Marshall	Principal	RealAlts Inc.
Туе	McAllister	Senior Pension Investments Analyst	ATCO / Canadian Utilities
Andrew	McCormick	Head of Fixed Income	T. Rowe Price
Alison	МсКау	Chief Executive Officer	SHEPP
David	МсКее	Vice-President, Client Relations & Institutional Sales	BNY Mellon Asset Management Canada Ltd.
Cameron	Miadovnik	Vice-President	AllianceBernstein
Jean-Francois	Milette	Global Head, Client Solutions	Trans-Canada Capital Inc.
Josee	Mondoux	Chief Investment Officer	СМРА
Paula	Moore	Vice-President, Tax & Treasury	Bayer Inc.
Marie Hélène	Noiseux	Professor of Finance	School of Management, Université du Québec à Montréal
Ryan	Ogrodniczuk	Vice-President, Finance	Hanover Group of Companies
Matt	O'Neill	Senior Finance Officer	University of Prince Edward Island
Michael	Parsons	Vice-President, Institutional	BNY Mellon Asset Management Canada Ltd.
Darren	Patrick	Managing Director, Relationship Management	MFS Investment Management
Yvan	Pepin	President of Pension Plan Board of Employees	University Laval
Philippe	Potvin	Vice-President, Institutional Sales	Fidelity Canada Institutional
Chris	Powell	Director, Infrastructure & Renewable Resources	Alberta Investment Management Corporation
Francois	Quinty	Director Investment Management	VIA Rail Canada Inc.
Grant	Ring	Chair, Superannuation Board	SaskPower
Rob	Ritchie	Chief Executive Officer	HRM Pension Plan
Tarik	Serri	Senior Director, Hedge Funds and Alternative Investments	Trans-Canada Capital Inc.
David	Shedd	Vice-President	Fidelity Canada Institutional
Colin	Sinclare	Managing Director, Institutional Business Development, Western Canada	MFS Investment Management
Alexandre	Souza	Treasury and Pension Assets Strategy Manager	Vale Canada Limited
Anthony	Spagnolo	Director	Baillie Gifford International LLC
Jason	Stefanelli	Director, Head of Canada	William Blair
Thomas	Suter	Senior Analyst, Investment Management	VIA Rail Canada Inc.
Gosia	Talanczuk	Vice-President, Investment Policy and Oversight	LAPP Corporation
Gary	Timlick	Chair Investment Committee	Winnipeg Civic Employee Benefits Program
Wylie	Tollette	Executive Vice-President, Head of Client Investment Solutions	Franklin Templeton
Benjamin	Treacy	Institutional Portfolio Manager	Fidelity Investments
Anthony	Treier	Senior Portfolio Manager, Fixed Income and Currencies	TELUS Corporation Pension Investments
Marie-Josee	Turmel	General Manager, Real Estate Investments, Pension Fund	Canada Post Pension Plan
Рере	U-nanupap	Senior Manager, Treasury	Finning International Inc.
Blake	Walker	Investment Committee Board	City of Edmonton
Chad	Yaskiw	Portfolio Manager, Public Markets	University of Alberta









RT. HON. JOE CLARK, FORMER PRIME MINISTER OF CANADA KEYNOTE SPEAKER

The Right Honourable Joe Clark was Canada's youngest Prime Minister and one of the most successful Foreign Ministers in Canadian history. At home and abroad, he earned and maintains a reputation for integrity and principle.

Today, he applies that experience on the front lines of Canada's work in promoting democracy and encouraging development in countries from Haiti, to Nigeria, to Ghana and the Democratic Republic of Congo. In 2020 he was appointed by Prime Minister Trudeau special envoy to persuade foreign governments to support Canada's bid for a non-permanent seat on the UN Security Council, to "continue to strengthen bilateral relationships...", and in September 2019, Clark represented Canada at the United Nations General Assembly.

A respected commentator in North America, he is also an innovator in the developing world, helping teach African farmers to harvest and market medicinal plants, unlocking the value of underwater forests, helping design independent Electoral Commissions.

Joe Clark played a key role in some of the defining accomplishments of recent history – the Free Trade Agreement, the fight against apartheid, the end of the Cold War and the negotiation of the Charlottetown Accord.

He connects Canada's past to our future and speaks passionately of the potential of modern Canada to make a real difference in today's complex and challenging world.



SEBASTIEN BETERMIER, ASSOCIATE PROFESSOR OF FINANCE, DESAUTELS FACULTY OF MANAGEMENT, MCGILL UNIVERSITY

Sebastien Betermier is an associate professor of finance at the Desautels Faculty of Management at McGill University. A world-renowned expert in pension investing, his articles have appeared in numerous academic journals, including the prestigious Journal of Finance. As a teacher, he teaches Canada's only pension-oriented university class for undergraduates, as well as a similar course for graduate students. He also serves as the faculty director of the McGill International Portfolio Challenge and as an advisor to Bank of Canada.





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WARD BROWN, FIXED INCOME PORTFOLIO MANAGER, MFS INVESTMENT MANAGEMENT

Ward Brown is an investment officer and fixed income portfolio manager at MFS Investment Management (MFS). He is a member of the emerging markets debt team and his management duties include MFS' emerging market debt strategies and institutional accounts, in addition to conducting macroeconomic research and individual credit analysis.

Brown joined MFS in 2005 as a fixed income research analyst and was named portfolio manager in 2008. Prior to joining MFS, he served as an economist for the International Monetary Fund for eight years. He spent four years as a research and teaching assistant for the Financial Markets Group at the London School of Economics and Political Science and later served as a lecturer at the school in the economics department.

Brown earned his bachelor's degree from McGill University and holds master's and doctoral degrees in economics from the London School of Economics and Political Science.



RYAN CLEMENTS, ASSISTANT PROFESSOR, CHAIR IN BUSINESS LAW AND REGULATION, FACULTY OF LAW, UNIVERSITY OF CALGARY

Dr. Ryan Clements is an assistant professor, chair in business law and regulation at the University of Calgary Faculty of Law. A former senior policy advisor at the Alberta Securities Commission, Ryan serves on the New Economy Advisory Committee at the ASC and the crypto-asset working group of the Investment Industry Regulatory Organization of Canada. His writing on the regulation of fintech (including decentralized finance), crypto-assets, securities, derivatives, systemic risk and new financial products have been published by numerous academic journals and international anthologies, including the *Banking and Finance Law Review*, the *University of Pennsylvania Journal of Business Law*, the *Virginia Law and Business Review*, and the *Routledge Handbook of Fintech*. He has also presented on diverse topics in financial product and fintech regulatory policy formation to regulators and government agencies across Canada, the United States and the European Union.





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SAMANTHA CLEYN, VICE-PRESIDENT, HEAD OF EASTERN CANADA, T. ROWE PRICE

Samantha Cleyn is head of eastern Canada for the Americas division of T. Rowe Price, the organization responsible for the firm's institutional business in North America. She is based in Montreal, Quebec and is a vice-president of T. Rowe Price (Canada), Inc.

Her investment industry experience began in 2004 and she has been with T. Rowe Price since 2020 as a member of the Americas division. Prior to T. Rowe Price, Cleyn was a senior investment consultant with Mercer Canada Ltd. She also worked for Pavilion Advisory Group as a research consultant and research team lead. Over her career, she has focused exclusively on the institutional market in Canada and worked with a diverse client base composed of wealth management programs, foundations, insurers, corporate and public defined benefit plans and defined contribution plans.

Cleyn earned an M.B.A. from Concordia University, John Molson School of Business. She also has earned the Chartered Financial Analyst® designation.



ROBERTO CROCE, HEAD OF RISK PARITY AND LIQUID ALTS, NEWTON INVESTMENT MANAGEMENT GROUP

Roberto Croce is a member of Newton's multi-asset team. In his current role, he is the head of risk parity and liquid alts, as well as the portfolio manager for the firm's risk parity and dynamic factor strategies. Rob joined Newton in September 2021, following the integration of Mellon Investments Corporation's equity and multi-asset capabilities into the Newton Investment Management Group. Before joining Newton, he was the head of risk parity and liquid alts and a senior portfolio manager at Mellon Investments Corporation (a BNY Mellon group company).

Prior to joining BNY Mellon, Croce was a managing director and head of quantitative strategies at Salient Partners. He was the lead portfolio manager on Salient's risk parity and managed futures strategies. Prior to joining Salient in 2011, he taught macroeconomics and finance at Ohio State University, published academic research and served as a research assistant. In 2010, he interned in the strategic research group at the Teacher Retirement System of Texas.

Croce has a bachelor of science in economics from Penn State University and both a masters and a PhD in economics from Ohio State University.



JOE FARADAY, DIRECTOR, INTERNATIONAL EQUITIES SPECIALISTS TEAM, BAILLIE GIFFORD

Joe Faraday joined Baillie Gifford in 2002 and has been a member of the International All Cap Portfolio Construction Group since 2007 and leads the international investment specialists team. He graduated MEng in chemical engineering from the University of Cambridge in 2002 and gained an master of business administration from the University of Edinburgh in 2009. He is also a CFA charterholder.





SERGE GERMAIN,

Conference

Global Investment

GENERAL MANAGER, PENSION COMMITTEE, UNIVERSITY OF SHERBROOKE

Serge Germain has been managing the University of Sherbrooke pension plan since 2002, overseeing all the functions of the pension office. The university offers a single pension plan to all its regular staff and the benefits offered is a hybrid pension plan combining a DC plan with a DB floor. The total assets reached 1.4 billion for the first time in the entire history of the fund during the last year. The maturity of the plan is quite young, with less than 35% of the total liabilities linked to its pensioners. On the investment side, the assets are 100% externally managed and is deployed through a concentrated group of firms, mostly deploying specialized mandate in traditional asset classes. Recently, the fund allocation was expended into the private and alternative space, focusing on private debt and real assets. Germain is a holder of the CFA Charter.



ADAM GOEHNER,

SENIOR MANAGER, ESG STRATEGY AND RISK, INVESTMENT STRATEGY AND RISK, BRITISH COLUMBIA INVESTMENT MANAGEMENT CORP.

Adam Goehner leads the ESG strategy and risk management team within the investment strategy and risk department at BCI. He oversees BCI's overall total portfolio ESG risk exposure and has developed a cross-asset class risk and opportunity identification framework to track and evaluate long-term systemic ESG risks and opportunities to inform investment strategies. The framework has been developed to measure the financial impacts from climate change and other systemic risks across all sub-industries and integrate relevant financial impact information into all levels of investment decisions. Goehner also supports private market transaction ESG due diligence. He provides recommendations on ESG risks and opportunities to multiple stakeholders, including pension trustees, senior leadership and portfolio managers.

His background includes advising public and private venture investments in strategic start-up companies, developing corporate sustainability and climate change strategies and supporting clean technology development accelerators. His early career involved working as an engineer developing and implementing energy efficiency projects in the energy sector.



INIGO FRASER JENKINS, CO-HEAD, INSTITUTIONAL SOLUTIONS, ALLIANCEBERNSTEIN

Inigo Fraser Jenkins is co-head of institutional solutions at AllianceBernstein. He was previously head of global quantitative strategy at Bernstein research. Prior to joining Bernstein in 2015, Fraser Jenkins headed Nomura's global quantitative strategy and European equity strategy teams after holding the position of European quantitative strategist at Lehman Brothers. He began his career at the Bank of England. Fraser Jenkins holds a bachelor of science in physics from Imperial College London, a master of science in history and philosophy of science from the London School of Economics and Political Science and a master of science in finance from Imperial College London.





SUNITA MAHANT,

Conference

Global Investment

HEAD OF GLOBAL INITIATIVES, DIVERSITY, EQUITY AND INCLUSION, IVANHOÉ CAMBRIDGE, THE REAL ESTATE WING OF THE CAISSE DE DÉPÔT ET PLACEMENT DU QUÉBEC

In her role as head of global initiatives, diversity, equity and inclusion (DEI), Sunita Mahant acts as a catalyst for the development and execution of the corporate DEI strategy by positioning Ivanhoé Cambridge as a real estate industry leader in these three areas. In addition to this role, Mahant provides strategic value-oriented solutions for projects in Canada and the Unites States related to the office and industrial assets in her capacity as senior director, legal affairs, investment management. In 2015, she was recognized by Lexpert Rising Stars as one of Canada's leading lawyers under 40. As lead counsel for CIBC Square, a new transformational office development in downtown Toronto of more than 3 million square feet, she was instrumental in the negotiation of the CIBC lease, approximately 1.6 million square feet, one of the largest office leases in Canadian history and winner of the 2018 Rex Award.

Recognized for her leadership qualities and keen mind, Mahant is actively involved with several organizations dedicated to workplace diversity, equity and inclusion, serving as co-president of the Promotion Committee of Women in Governance and a director of the Commercial Real Estate Equity and Diversity Council (CREED). She was the initiator and ambassador of the first Women's Forum at Ivanhoé Cambridge.

Mahant holds a bachelor of political science and a bachelor of laws and is a member of the Ontario Bar. She received her mini-MBA from the Association of Corporate Counsel (ACC). Sunita speaks four languages: Hindi, Punjabi, French and English.



CATHERINE ANN MARSHALL, PRINCIPAL CONSULTANT, REALALTS INC.

Catherine leads RealAlts, a real assets investment consulting firm focused on climate change and ESG. Realalts' goal is to improve client's performance through ESG integration. Since 2008, she has worked with a wide variety of Canadian and global asset owners and investment managers. Prior to becoming a consultant, Marshall held executive roles in institutional investment management including LaSalle Investment Management and Canada Pension Plan Investment Board (CPPIB). Marshall has also worked as an associate partner at Aon/ Townsend Investment Consulting. She is a graduate of the global Sustainability and Climate Risk certification program. In addition, she holds the CFA designation and has a master's degree in economics and finance.





ANDREW MCCORMICK,

Conference

Global Investment

HEAD OF GLOBAL FIXED INCOME AND CHIEF INVESTMENT OFFICER, **T. ROWE PRICE**

Andy McCormick is the head of global fixed income and chief investment officer (CIO) of the fixed income division. He is chairman of the fixed income steering committee and a member of the firm's management, investment management steering, and product strategy committees. He also is a vice-president of T. Rowe Price Group, Inc., T. Rowe Price Associates, Inc. and T. Rowe Price Trust Company.

McCormick's investment experience began in 1983 and he has been with T. Rowe Price since 2008, beginning as a portfolio manager in the fixed income division. He was the head of the U.S. taxable team, led the securitized team and was a portfolio manager for the GNMA and total return bond strategies before becoming the head of fixed income in 2019. In 2021, he assumed his current chief investment officer role. Prior to T. Rowe Price, he spent 13 years on Wall Street trading mortgages and agency securities, 10 years at Fannie Mae managing significant mortgage assets and two years working with a hedge fund manager and mortgage real estate investment trust firm.

McCormick earned a B.S. in finance from Syracuse University.



CHRIS POWELL, DIRECTOR, INFRASTRUCTURE AND RENEWABLE RESOURCES, ALBERTA INVESTMENT MANAGEMENT CORP

Chris Powell is a director in the infrastructure and renewable resources group for Alberta Investment Management Corp (AIMCo) where he leads the origination, evaluation, selection and diligence efforts of private infrastructure transactions, as well as on-going management and governance of current investments. His transaction experience within the infrastructure space has spanned numerous sectors including utilities, renewables, power generation, toll roads, airports, pipelines and other midstream assets.

Powell currently serves on the board of Grupo SAESA and AusNet Services on behalf of AIMCo, as well as various advisory committees.

Before joining AIMCo in 2007, he was a public equity portfolio manager specializing in North American equities and income trusts for institutions and high net worth clients. Prior to professional financial roles, Powell was a technical advisor to large energy and energy infrastructure companies for environmental remediation and assessment programs. He has also had previous junior roles at a large Canadian rail company and Canadian utility.

Powell is a CFA charterholder and also holds an MBA and a bachelor of science from the University of Alberta.





TARIK SERRI,

Conference

Global Investment

SENIOR DIRECTOR, HEDGE FUNDS AND ALTERNATIVE INVESTMENTS, TRANS-CANADA CAPITAL INC.

As senior director, hedge funds and alternative investments, Tarik Serri is responsible for the ongoing management, monitoring and research of all TCC's hedge fund and private debt portfolios, which are part of a diversified alternatives program investing in global hedge funds and alternative strategies. He joined the firm in 2011 and has over 17 years of investment experience, having previously worked as an analyst and investment advisor at several financial institutions. Serri holds a bachelor of commerce degree from Concordia University and a master of business administration from HEC Montréal. He has completed the Canadian Securities Course offered by the Canadian Securities Institute and is a CFA and CAIA charterholder. He is also a recipient of the NextGen 2019 nomination by CIO Magazine.



WYLIE TOLLETTE,

EXECUTIVE VICE-PRESIDENT, HEAD OF CLIENT INVESTMENT SOLUTIONS, FRANKLIN TEMPLETON INVESTMENT SOLUTIONS FRANKLIN ADVISERS, INC.

Wylie Tollette is executive vice-president and head of client investment solutions for Franklin Templeton Investment Solutions. In this role, his key responsibilities include oversight of client investment solution development and the portfolio management teams for our multi-asset platform. Additionally, Tollette provides strategic advisory services to institutional clients on topics such as optimizing strategic and dynamic asset allocation, enhancing the understanding of exposures and key risks and strengthening governance and decision-making. His team partners closely with the company's global distribution groups on all multi-asset solutions opportunities across a broad range of clients.

Prior to rejoining Franklin Templeton, Tollette served as chief operating investment officer at CalPERS, the largest defined benefit public pension fund in the U.S. He helped to lead initiatives focused on enhancing the portfolio and investment decision-making process, engaged the CalPERS board and various constituents and helped to redesign the asset allocation and investment strategy committee. He was also responsible for investment performance and risk analytics, investment policy, investment manager engagement, operations, compliance and business planning.

Prior to his time at CalPERS, Tollette worked at Franklin Templeton for almost 20 years, including as the head of the performance analysis and investment risk team, which was responsible for collaboratively defining, measuring and managing investment risk and performance across all Franklin Templeton products and clients. He entered the financial services industry in 1989 as an accountant for KPMG Peat Marwick.

Tollette received a bachelor of science from the University of California, Davis and a master of science in finance from the University of London. He is a chartered financial analyst (CFA) charterholder and is a member of the CFA association of Sacramento and San Francisco. He also holds a CPA (inactive) designation and is a member of the American Institute of Certified Public Accountants.





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BENJAMIN D. TREACY, INSTITUTIONAL PORTFOLIO MANAGER, FIDELITY INVESTMENTS

Benjamin Treacy is an institutional portfolio manager for Fidelity Investments. In this role, he is a member of the portfolio management team covering U.S. and quantitative equity strategies. Prior to assuming his current role, Treacy was director of investment analysis at Fidelity Management and Research Company (FMRCo) from 2000 through 2008. He was responsible for product management, product development and analytical support for Fidelity mutual funds. Before joining Fidelity, Treacy was an investment specialist at Standish, Ayer & Wood, Inc. in Boston from 1995 to 2000. His responsibilities included presenting investment strategies to prospective clients and consultants.

Treacy earned his bachelor of arts degree in economics from the University of Massachusetts, Amherst and his master of business administration degree from Babson College. He is a Chartered Financial Analyst (CFA) charterholder, a member of the CFA Institute and a member of the Boston Security Analysts Society.









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We have been managing money for Canadian clients for over 30 years and provide a variety of international, emerging markets and global equity portfolios for public and corporate pension plans in Canada, as well as a variety of non-pension sponsors.

The success of the firm has been largely built on the simple foundations of good performance, good service and low staff turnover. Independent ownership allows us to focus on the key areas of investment performance and proactive client service. Our partnership structure fosters stability and loyalty in our people and as investment management is our only business, we have no conflicts of interest, which gives an extra clear focus to our clients' needs.

Our structure combines the best of experience and international comparison. We believe that our analysis of individual business has added the most value for our clients. Not only has it helped us to produce steady returns from stock selection – we feel this to be a more reliable source of return because it is based on hundreds of separate decisions – but it has also alerted us to forthcoming wider macroeconomic challenges.

Our professional investors scour the world in search of new stock ideas. We spend much more time with academics and entrepreneurs than we do looking at traditional sources of investment research. We believe our approach will stand us in good stead as we embark on our second century of investment management for leading institutional clients.

¹ *As of December 31, 2021

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BNY MELLON INVESTMENT MANAGEMENT

BNY Mellon Investment Management is a leading investment manager, with \$2.4 trillion* in assets under management as of December 31, 2021. Through an investor-first approach, the firm brings to clients the best of both worlds: expertise from eight specialist investment managers offering solutions across every major asset class, backed by the strength, stability, and global presence of BNY Mellon.

Investment services in Canada are offered through BNY Mellon Asset Management Canada Ltd. (BNYM AM Canada),registered as a Portfolio Manager and Exempt Market Dealer in all provinces and territories of Canada and as a Commodity Trading Manager in Ontario. BNYM AM Canada is an indirect wholly-owned subsidiary of The Bank of New York Mellon Corporation. This information has been provided by BNYM AM Canada for use with institutional investors only and may not be redistributed without authorization.

BNY Mellon Investment Management is a division of BNY Mellon, which has \$46.7 trillion in assets under custody and/or administration as of December 31, 2021. BNY Mellon can act as a single point of contact for clients looking to create, trade, hold, manage, service, distribute or restructure investments. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation (NYSE: BK). Additional information is available on www.bnymellon. com. Follow us on Twitter @BNYMellon or visit our newsroom at www.bnymellon.com/newsroom for the latest company news.

*This includes Wealth Management. Unless otherwise indicated, all financial data is shown in USD.





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FIDELITY CANADA INSTITUTIONAL

Fidelity Canada Institutional serves a diversified client base across all major asset classes, focusing on corporate and public defined benefit and defined contribution pension plans, endowments and foundations, insurance companies, MEPPS and financial institutions. Built on over 50 years of serving the needs of institutional investors worldwide, we offer active and risk-controlled disciplines including; Canadian, U.S., international and global equity, fixed-income, asset allocation, real estate and custom solutions.

Philosophy and Approach

The cornerstone of our investment philosophy is the belief that outstanding research drives results.

We believe in fundamental bottom-up research that is focused on identifying opportunities that offer stable growth through an investment cycle. Combined with prudent risk management and portfolio construction expertise, this allows us to offer best-in-class solutions aligned with our clients' interests.

Research Excellence

 Our global research capabilities and portfolio construction expertise allows us to combine investment insights and our unique perspectives into actionable solutions to meet the needs of our clients.

Proprietary Insights & Unrivalled Access

- Exclusive access to in-house research, unavailable to others.
- Unparalleled access to company management, central bankers and policymakers around the world.
- Our analysts carry out on-the-ground research-visiting companies and speaking to customers, competitors, suppliers and independent experts to gain conviction.

360° Views on Companies

• We combine insights from equity and credit research to form a 360° view on companies.

Client-Focused Alignment

- A commitment to understanding each client's business, goals and expectations
- Long-term value creation aligned with our clients' goals
- A client-service culture focused on accountability, accessibility and transparency

We have the experience to develop the investment solutions that are right for you.

CONTACT:

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FRANKLIN TEMPLETON

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Franklin Templeton is a global investment management organization serving clients in over 165 countries. Everything Franklin Templeton does has a single focus: to deliver better client outcomes through investment management expertise, wealth management and technology solutions. The company is made up of diverse and independent specialist investment managers that are entrepreneurial and practice true specialization. Through its specialist investment managers, the company 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. With offices in more than 30 countries and approximately 1,300 investment professionals, the California-based company has 75 years of investment experience and over US\$1.5 trillion (over CAN\$1.9 trillion) in assets under management as of December 31, 2021. Franklin Templeton aims to offer the best of both worlds: global strength and boutique specialization.

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MFS is a global investment manager with capabilities spanning all major asset classes, serving institutional investors and consultants for more than 40 years. The firm manages US\$692 billion for clients across the global (as of 12/31/21).

What sets MFS apart from other managers is that we have aligned our active investment approach and how we serve clients with a sole purpose: to create long-term value responsibly. Through that sense of responsibility and the strength of our investment platform, we strive to protect our investors' assets and our clients' reputations. Our powerful investment approach combines collective expertise, thoughtful risk management and long-term discipline to uncover investment opportunities that drive sustainable value for investors. We call this Active Intelligence[®], and we support it with our distinct culture of shared values and collaboration. That means bringing together teams of diverse thinkers to actively debate ideas, assess material risks and uncover what we believe are the best investment opportunities in the market.

As an active, global investment manager with investment and industry professionals located in nine financial centers across five continents, MFS is committed to being a valued partner for plan sponsors, endowments, foundations, sovereign wealth funds, insurance companies, intermediaries and consultants worldwide. We help clients meet their financial goals by providing long term focused investment strategies, flexible investment vehicles and perspectives on the financial markets.

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Website: https://www.mfs.com/en-ca/institutions-and-consultants.html

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PICTET ASSET MANAGEMENT

Who we are

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Pictet Asset Management (Pictet AM) is an independent asset manager, investing for our clients across a range of equity, fixed income, alternative and multi-asset products. We provide specialist investment services through segregated accounts and investment funds to some of the world's largest pension funds, financial institutions, sovereign wealth funds, intermediaries and their clients. Our North American presence was established in Montreal in 1974. We have been managing assets for Canadian institutional clients for over 30 years. Pictet AM is part of the Pictet Group, an investment-led services group founded in Geneva in 1805 whose unique partnership structure has provided the stable foundation for our long-term thinking. We are dedicated to client service. Our aim is to be the investment partner of choice to our clients. This means giving them our undivided attention, offering pioneering strategies and being committed to excellence.

Our investment focus

We believe in active management with a strong focus on valuation across equity, credit, sovereign debt and currencies. As a multi-boutique firm, we embrace a variety of investment styles, allowing our teams to implement the best approach for their respective asset classes. Our investment resources are focused around our core capabilities: Alternatives (including Real Estate and Private Equity), Thematics, Emerging Markets and Multi Asset. Our investment managers operate independently to encourage innovation and accountability, while consistent implementation of their investment philosophy and process is regularly monitored. We manage risk as much as portfolios, with risk management an integral part of the decision-making process.

A commitment to sustainability

We believe in responsible capitalism and take an enlarged view of the economy and its interactions with civil society and the natural environment. We are convinced that Environmental, Social and Governance (ESG) considerations can help us make better longterm investment decisions for our clients. The strength of our convictions led us to create a range of innovative environmental and social equity strategies that are today among the oldest and largest in the market. We integrate material ESG criteria in all our investment processes and active ownership activities with a view to enhance returns and/ or mitigate risks. We also include ESG in our risk management and reporting tools in order to maintain high standards of transparency and accountability.

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Website: https://www.am.pictet/en/canada/institutional LinkedIn: Pictet Asset Management Twitter: @PictetAM

Date as 31st December 2021

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T. Rowe Price is an asset management firm focused on delivering global investment management excellence that investors can rely on-now, and over the long term.

We provide an array of separate account management and related services for institutions and accredited investors.

Our intellectual rigor helps us seek the best ideas for our clients, our integrity ensures that we always put their interests first, and our stability lets us stay focused on their goals as we pursue better investment outcomes.

The principle on which Thomas Rowe Price, Jr., founded the firm in 1937-that his company's success should follow from the success it achieves for its clients-continues to guide us today. Our disciplined investment approach is rooted in proprietary research carried out by experienced professionals around the globe. To this approach, we bring a deep understanding of client needs and a long-term view that balances risk and reward. And we nurture a culture that encourages collaboration and diverse thinking.

Facts about T. Rowe Price as of December 31, 2021:

- CAD \$2135.1 billion¹ in assets under management (over 50% institutional)
- Headquartered in Baltimore, MD U.S. with 23 offices in 17 countries across four continents
- Serves clients in over 50 countries
- 7,500+ associates worldwide
- Offers a full range of equity and fixed income strategies across various market capitalizations, sectors, styles, and regions
- Management Committee members average 17 years' tenure
- Investment portfolio managers average 16 years' tenure
- Publicly traded, independent organization with substantial associate ownership (NASDAQ-GS: TROW)
- Solid balance sheet with no long-term debt

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Website: https://www.troweprice.com/institutional/ca/en/home.html

¹Firmwide AUM includes assets managed by T. Rowe Price Associates, Inc. and its investment advisory affiliates. Assets under management are calculated in U.S. dollars and converted to Canadian dollars using an exchange rate determined by an independent third party.

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Trans-Canada Capital (TCC) is an asset management firm specializing in innovative investment strategies for institutional investors. Since 2009, the team has successfully managed the pension assets of Air Canada, one of the largest corporate pension plans in the country. Over the years, we have earned an enviable reputation by generating superior returns through strategies focusing on alpha generation in a rigorous risk-controlled framework. With over C\$30 billion in assets under management, more than 90 investment professionals based in Montreal and Toronto, and a complete range of alternative solutions, TCC is well positioned to meet the needs of institutional investors seeking steady returns.

One team, no silos

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Our team approach means that all investment choices are made by a team of investment professionals with strong, diverse and complementary backgrounds. We are focused on constantly introducing new investment ideas and exploring promising opportunities.

Product offering

- Fixed Income: Sophisticated strategies to generate added-value, control undesired risks and further diversify active bets
- Equities: Diversified sources of alpha within equity strategies, including long only, and long/ short equity funds
- Alternative: Easy and immediate access to a diversified private markets portfolio
- Absolute Return: Internally and externally managed funds, investing in a wide range of financial instruments

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WILLIAM BLAIR INVESTMENT MANAGEMENT

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We have deep expertise: 94% of William Blair Investment Management's institutional portfolio managers and analysts have earned advanced degrees or are CFA charterholders. And the stability of our teams is at the core of our success in creating sustainable value for our clients.

Our highly collaborative team draws on intensive research and insightful judgment that comes only from experience, and our investment process is designed to be disciplined, rigorous, and, most importantly, repeatable. Moreover, we evolve to meet our clients' needs while remaining true to our core investment strengths and maintaining our uncompromising integrity. This consistent approach builds alignment- and client relationships-that endure over the long term.

About William Blair Investment Management

William Blair is committed to building enduring relationships with our clients and providing expertise and solutions to meet their evolving needs. We work closely with the most sophisticated investors globally across institutional and intermediary channels. We are 100% active-employee-owned with broad-based ownership. Our investment teams are solely focused on active management and employ disciplined, analytical research processes across a wide range of strategies. As of 31 December 2021, we manage C\$100.6 billion in assets. We are based in Chicago with resources in New York, London, Zurich, Sydney, Stockholm, Singapore¹, and The Hague, and dedicated coverage for Canada.

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Website: active.williamblair.com LinkedIn: LinkedIn

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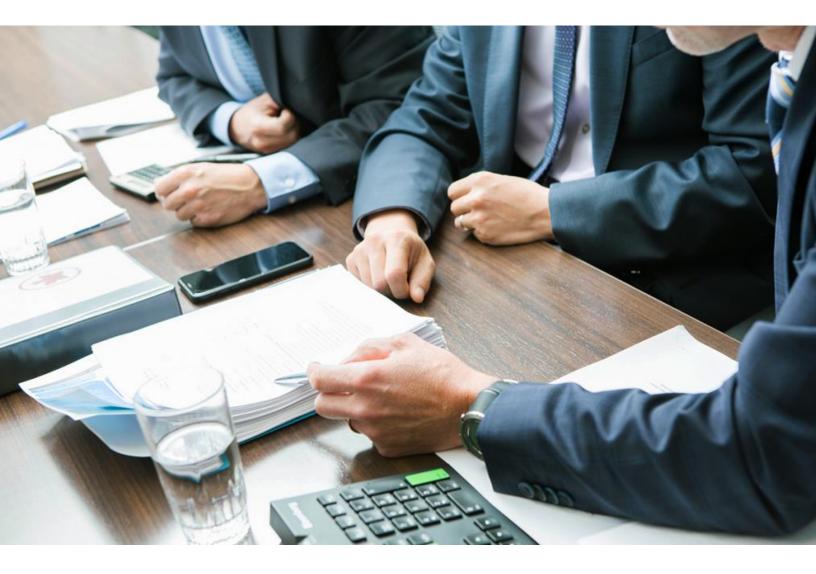
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Shades of Sustainability

As Canadian plan sponsors think about investing in sustainability, we are often asked about what distinguishes our dedicated sustainability strategies from our traditional strategies. ESG factors are already integrated into company analysis for all of our fundamental equity strategies. But our dedicated sustainability strategies typically display an organic alignment with sustainability themes. Themes evident within the portfolios may include decarbonization, the circular economy, energy efficiency, human health improvement, inclusion, and strong institutions.

Explore more: active.williamblair.com Contact: Jason R. Stefanelli, Director, Canada, +1 617 784 5662

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