

NEW ERA, SAME COMMITMENT TO EXCELLENCE



GLOBAL ASSET
MANAGEMENT

In November 2020, CI Investments Inc. adopted the name CI Global Asset Management ("CI GAM") to reflect our global scale and industry-leading selection of innovative strategies and services. Since 1965, we have been dedicated to modernizing asset management. Today, we offer a diverse lineup of investment options, including mutual funds, ETFs, managed portfolios, liquid alternatives, private market funds, cryptocurrency funds, ESG funds, and segregated funds.

CI GAM AT-A-GLANCE

STRENGTH AND GLOBAL REACH

- One of the largest independent asset management companies in Canada with offices in the United States, Hong Kong and Australia serving the needs of retail, financial intermediary and institutional investors.
- More than 90 investment professionals—each with extensive expertise navigating multiple markets.
- \$125.0 billion in assets under management.
- The institutional team is entrusted with managing over \$7 billion of client assets, with a client base that spans pension plans, endowments and foundations, First Nations, family offices and financial intermediaries.

All figures are as of December 31, 2023.

INVESTMENT INNOVATION

- As a signatory of the UN PRI, we focus on integrating Environmental, Social and Governance (ESG) screens into our investment process.
- Institutional investors require a bespoke approach to investment management. That's why we offer a full suite of solutions and a dedicated team of investment professionals who are focused on client excellence.
- We put our core investment capabilities to work by providing customized solutions which target client-specific outcomes.
- We offer institutional asset owners a choice of investment vehicles to utilize, from institutional pooled funds to segregated account management.

CI GAM INVESTMENT MANAGEMENT PLATFORM



INVESTMENT MANAGEMENT EXPERTISE

CI Global Asset Management's strength comes from our uniquely integrated teams of portfolio managers with diverse investment capabilities.

EXPERIENCED GLOBAL LEADERSHIP



Marc-André Lewis

Executive Vice-President, Chief Investment Officer and Co-Head of CI GAM

Marc-André Lewis, an accomplished investment professional with extensive global experience, was named Executive Vice-President and Head of Investment Management for CI GAM in 2021.

Mr. Lewis joined CI GAM from the Abu Dhabi Investment Authority ("ADIA"), one of the world's largest sovereign wealth funds, where he was Head of Portfolio Construction. He leads a group of more than 90 investment professionals and overseeing the continued development of CI GAM's integrated global investment platform.

OUR WORLD-LEADING LINEUP OF PORTFOLIO MANAGERS

Our deeply experienced and diversely talented teams employ some of the industry's brightest investment minds, whose knowledge and experience in research, security selection, and risk management work on behalf of your clients. Each team:

- Is empowered to think independently and held accountable for the results they achieve
- Shares their insight, expertise, ideas, and research to bring the full scale and intellectual capital of CI GAM to benefit each and every client
- Takes an active approach to deliver the best possible investment outcomes to help each investor achieve their distinct goals

CI GAM: A MODERN APPROACH TO INVESTMENT MANAGEMENT



Research at the core



Rigorous portfolio
construction



Decision-making guided
by advanced data
and analytics



Efficient execution
and rebalancing
of our strategies

A DIVERSE AND COMPLEMENTARY SET OF EXPERTISE IN TRADITIONAL AND ALTERNATE ASSET CLASSES

Alternatives	"Traditional" Assets	Cash and equivalents	Government Bonds	IG Corporate Debts	Listed Equities	High Yield
		Preferred Shares	Convertible Bonds	Currencies		
	Private Assets	Private Credit	Private Real Estate	Private Infrastructure	Venture Capital	Private Equity
	Financial Alternatives	Liquid Alternative	Systematic	Crypto Currencies		
	Real Assets	Commodities				

To learn more about CI Global Asset Management and investment solutions, visit <https://www.cifinancial.com/ci-gam/ca/en/portfolio-management/ci-institutional-asset-management.html> or email: ciinstitutional@ci.com.



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The United Nations Principles for Responsible Investment (UNPRI) is the world's leading proponent of responsible investment. It encourages investors to use responsible investment to enhance returns and better manage risks.

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