

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 100 investment professionals—each with extensive expertise navigating multiple markets.
- Over \$CAD 130 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, foundations, First Nations, family offices and financial intermediaries.

All figures are as of December 31, 2024.

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.

OUR CHIEF INVESTMENT OFFICER



Marc-André Lewis

President and Chief Investment Officer

Marc-André Lewis joined CI GAM in 2021 and has over 20 years of global investing experience. He held senior leadership positions at several organizations, including two of the world's largest institutional investors. His experience spans asset allocation, portfolio construction, risk management, public and private markets, and fundamental and quantitative strategies.

Prior to joining CI GAM, Marc-André was Head of Portfolio Construction at the Abu Dhabi Investment Authority, one of the world's largest sovereign wealth funds. He holds a PhD in theoretical physics from Pierre and Marie Curie University, and an MSc in theoretical physics and a BSc in mathematics & physics from Université de Montréal.

Marc-André now leads a team of over 100 investment professionals and oversees 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	Listed Equities	Government Bonds	Investment Grade/ High Yield Credit	Preferred Shares	Convertible Bonds
		Currencies	Cash & Equivalents			
	Private Assets	Private Credit	Private Real Estate	Private Infrastructure	Venture Capital	Private Equity
	Financial Alternatives	Liquid Alternatives	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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