



CONNOR, CLARK & LUNN  
FINANCIAL GROUP



CREATING  
CONDITIONS  
FOR SUCCESS

*“Connor, Clark & Lunn Financial Group brings together the talents of diverse investment teams in a multi-boutique structure. Together, we focus on creating the conditions for success for our clients, partners and employees.”*

~ Warren Stoddart, Chief Executive Officer

# CONNOR, CLARK & LUNN FINANCIAL GROUP

At Connor, Clark & Lunn Financial Group we understand that every client is unique and that your goals and objectives may evolve over time. Whether you're seeking a specific investment strategy or a total portfolio solution, we have the expertise to help meet your needs.



Over 40 years of experience offering investment solutions to institutional investors across a broad array of traditional and alternative strategies

**\$142**  
BILLION

One of the largest investment management firms in Canada with over \$142 billion (CDN) in total assets under management



A full range of investment management services:

- Equity and fixed income
- Developed, emerging & frontier markets
- Public and private markets
- Traditional and alternative investments



Offices located across Canada, the US, UK & India.

# OUR STRUCTURE

Connor, Clark & Lunn Financial Group provides a broad range of traditional and alternative investment strategies and services to pension funds, foundations and endowments, First Nations, insurance companies, trusts, sub-advisory and other institutional clients through a diverse family of affiliates.

Each of the investment management teams within CC&L Financial Group offers a unique investment approach and has a distinct area of expertise. With non-investment management support provided by CC&L Financial Group, the investment teams are able to focus on what they do best — making investment decisions to create value for their clients.



- Marketing
- Stewardship and Engagement
- Corporate Accounting
- Legal and Compliance
- Information Systems
- Portfolio Accounting
- Trade Operations
- Performance Reporting
- Operations Risk







## STRATEGIC ADVICE

Investors are often faced with complex challenges in meeting investment objectives. As global economies evolve and innovative investment solutions arise, understanding both the risks and opportunities is critical to making informed decisions.

As a trusted industry participant, CC&L Financial Group draws upon its broad resources and experience to provide education and strategic advice to investors of all sizes and stages of development. Whether it's learning about new investment strategies, risk management, portfolio implementation, capital market dynamics, governance or fiduciary considerations, we are here to help.

Connor, Clark & Lunn Financial Group's **Strategic Exchange** is an initiative to promote dialogue and the understanding and development of solutions to the often complex investment challenges faced by investors.

Under the direction of Peter Muldowney, Senior Vice President, Head of Institutional and Multi-Asset Strategy, we bring together plan sponsors and consultants in a variety of interactive, educational forums. We also produce thought pieces addressing issues that are top of mind to those involved in managing and overseeing asset portfolios.

If you are facing a particular investment challenge, we're here to help.

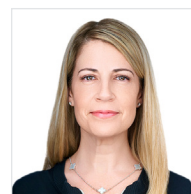


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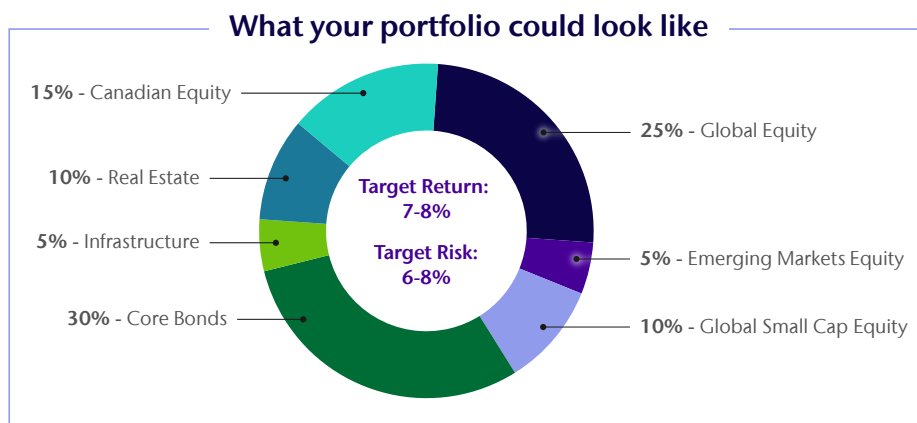
## CC&L MULTI-ASSET INSTITUTIONAL PORTFOLIOS

At Connor, Clark & Lunn Financial Group, we have over 40 years' experience building custom multi-asset solutions. Our affiliate investment teams offer proactive and flexible structures to embrace the evolving needs and challenges of institutional investors and the markets.



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Connor, Clark & Lunn One's Multi-Asset Institutional Portfolios streamline clients' experience and provide access to a customized mix of traditional and alternative assets through one firm, one contract, and one fee schedule. Further, clients are supported by a dedicated senior client service representative. Clients will receive detailed and timely reports and information on investment research and trends.



*The investment solution will be provided to you through CC&L One, an affiliate within the CC&L Financial Group.*

## WHY CC&L ONE MULTI-ASSET INSTITUTIONAL PORTFOLIOS

### FLEXIBLE SOLUTIONS, FOCUSED RESULTS



#### Simplicity

- One contract for all asset classes
- Single blended fee specific to the invested asset mix
- Direct relationship, supported by a single client service professional
- Automated capital call process for real assets
- One consolidated quarterly report, with performance of underlying asset classes



#### Accessibility

- No individual asset class minimums<sup>1</sup>
- Smaller plans can benefit from greater asset class diversification and access to alternatives



#### Flexibility

- Ability to select from any CC&L Financial Group affiliate and asset class
- Can be used to augment the client's existing investments
- Easily add or remove assets to the client's portfolio mix

<sup>1</sup>Minimum of 2 asset classes and clients must have at least \$25 million of investible assets

## INVESTMENT SOLUTIONS CRAFTED TO FIT YOUR NEEDS

From offices in Canada, the US and the UK, the CC&L Institutional team focuses on the development of new business relationships. They believe that developing a deep understanding of prospective clients' needs is critical to the construction of effective investment solutions. Whether you are looking for specific investment strategies or holistic portfolio solutions, we have the expertise to help you achieve your investment goals.

### WHY INVEST WITH US

#### We listen. We understand.

We recognize that every plan is different. We take the time to understand your specific requirements and draw upon our multi-boutique platform to provide investment solutions customized to meet your needs.

#### Expertise

With expertise gathered through years of experience, our sales representatives are thoroughly familiar with the investment challenges faced by institutional investors. Their depth of understanding of investor needs is paired with detailed knowledge of the investment strategies offered by our specialized investment teams. Combining knowledge, understanding and experience enables us to tailor the best solution to help you achieve your goals.

#### Diverse and broad array of products

We represent a diverse family of affiliate investment teams that collectively offer a broad range of distinct and independently managed traditional and alternative investment products and services.

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# INVESTMENT SOLUTIONS AT A GLANCE

- Fundamental Approach
- Quantitative Approach
- Alternative Approach

Baker Gilmore  
CC&L Investment  
Management  
CC&L Infrastructure  
Crestpoint  
FortWood  
Global Alpha  
NS Partners  
PCJ  
Scheer Rowlett  
Vergent

Asset Class	Style	Investment Managers									
Fixed Income											
Money Market											
Short-Term Bond											
Long-Term Bond											
Core/Universe Bond											
Core Plus Fixed Income											
Government Bond											
Corporate Bond											
Residential Mortgages											
Structured Credit											
High Yield Bond											
Portable Alpha											
Absolute Return Bond											
Custom Fixed Income Solutions											
Emerging Markets Corporate Credit											
Emerging Markets Sovereign Credit											
Canadian Equity											
Canadian Equity	Value										
Canadian Equity	Core										
Canadian Equity	Growth										
Canadian Equity Focused	Growth										
Canadian Equity Focused	Value										
Canadian Equity Income & Growth											
Canadian Equity Extension	Long/Short										
Sustainable Canadian Equity	Long										
Canadian Small Cap	Core										
Canadian Small Cap	Growth										
Global Equity											
ACWI ex-US Equity	Core/Growth										
China Equity	Core										
Global Equity	Core										
Global Small Cap Equity	Core										
ACWI Equity Extension	Long/Short										
World Equity Extension	Long/Short										
Global Long/Short Equity	Long/Short										
US Equity Extension	Long/Short										
International Equity	Core/Growth										
International Equity	Core										
International Equity Extension	Long/Short										
World ex-USA Equity Extension	Long/Short										
International Equity Focused	Core/Growth										
International Small Cap Equity	Core										
European Equity	Core/Growth										
Emerging Markets Equity	Core/Growth										
Emerging Markets Equity	Core										
Emerging Markets Equity Extension	Long/Short										
Emerging Markets ex China Equity	Core										
Emerging Markets Small Cap Equity	Core										
Sustainable Emerging Markets Equity	Core/Growth										
Sustainable Global Small Cap Equity	Core										
Frontier Markets Equity	Core										
Middle East and North Africa (MENA) Equity	Core										
Balanced											
Balanced											
Custom Balanced Solutions											
CC&L Multi-Asset Institutional Portfolios											
Alternative											
Real Estate	Core/Growth										
Commercial Mortgages	Core/Growth										
Infrastructure	Mid-market										
Infrastructure Energy Transition	Mid-market										
Private Equity	Mid-market										
Private Loans	Mid-market										
Market Neutral											
Emerging Markets Absolute Return Credit											

➔ Please read on for a quick snapshot of each affiliate manager.



## FIXED INCOME SOLUTIONS

Baker Gilmore & Associates Inc. is one of Canada's largest specialty fixed income managers. Founded in 1988, the Montreal-based firm has established a long track record of adding value across a wide range of mandates.

<b>Founded:</b>	1988
<b>Specialty:</b>	Fixed Income
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"><li>• Short-Term Bond</li><li>• Long-Term Bond</li><li>• Universe (Core) Bond</li><li>• Government Bond</li><li>• Corporate Bond</li><li>• Absolute Return Bond</li><li>• Residential Mortgages</li><li>• Custom Fixed Income Solutions</li></ul>
<b>Website:</b>	<a href="http://www.bakergilmore.com">www.bakergilmore.com</a>

Baker Gilmore's investment approach combines fundamentally driven forecasts of the key factors driving bond market returns with active management that is underpinned by rigorous portfolio construction and sophisticated risk management.

Baker Gilmore believes that markets regularly deviate from fundamentals, allowing a value-driven approach to generate superior returns over a longer-term investment horizon. Delivering consistent added value is best achieved through the pursuit of multiple, diversified strategies that capitalize on the best investment opportunities available in the market.

While offering a wide array of traditional fixed income products, Baker Gilmore takes pride in its ability to create customized investment solutions that reflect clients' specific return objectives and risk tolerances.

## CONNECTING NEEDS WITH INVESTMENT SOLUTIONS

Connor, Clark & Lunn Investment Management Ltd. is an institutional money manager based in Vancouver, Canada. Having provided investment management services to institutional clients since 1982, CC&L Investment Management has a strong, stable team of investment professionals managing a broad range of investment solutions that spans traditional asset classes, including Canadian and foreign equities; fixed income and balanced; and alternative strategies such as market neutral, absolute return, long-short and portable alpha.

<b>Founded:</b>	1982
<b>Specialty:</b>	Multi-asset
<b>Style:</b>	Core, Growth, Value
<b>Approach:</b>	Fundamental, Quantitative
<b>Products:</b>	<ul style="list-style-type: none"> <li>• Fixed Income</li> <li>• Fundamental Equity</li> <li>• Quantitative Equity</li> <li>• Market Neutral</li> <li>• Balanced</li> <li>• Equity Extension</li> </ul>
<b>Website:</b>	<a href="http://www.cclinvest.com">www.cclinvest.com</a>

At CC&L Investment Management, each investment team is focused on assessing investment opportunity and risk. The teams follow a disciplined approach to portfolio management based on rigorous financial, economic and fundamental company analysis, incorporating leading edge proprietary risk management tools.

Research is closely integrated with portfolio management as the firm employs dedicated research teams focused on developing and enhancing structured approaches designed to add value for clients.

CC&L Investment Management has an established reputation for excellence and leadership in the investment management community.



## BUILDING A STRONG FOUNDATION

Connor, Clark & Lunn Infrastructure invests in mid-market infrastructure and infrastructure-like assets and companies with highly attractive risk-return characteristics, long lives and the potential to generate stable cash flow.

<b>Founded:</b>	2005
<b>Specialty:</b>	Infrastructure
<b>Approach:</b>	Mid-Market
<b>Products:</b>	<ul style="list-style-type: none"><li>• Traditional Infrastructure</li><li>• Energy Transition</li></ul>
<b>Website:</b>	<a href="http://www.cclinfrastructure.com">www.cclinfrastructure.com</a>

CC&L Infrastructure is an experienced owner and active manager of infrastructure assets with a strong history of creating value for its clients. The team is patient and focused on investing in high-quality infrastructure assets for the long-term, with the aim of achieving attractive risk-adjusted client returns.

- **Disciplined Investment Approach:** Targets traditional infrastructure (transport, social, water, communications, etc.) and energy transition (power generation, electricity transmission, etc.) projects located in North America and select other credit-worthy jurisdictions. CC&L Infrastructure invests at both the construction and operating stage and concentrates on assets ranging in size from approximately \$50 million - \$750 million.
- **Open-Ended Structure:** Allows for the ownership of infrastructure assets for the long term; alleviates the need to sell on a predetermined schedule and aligns the investment horizon with that of institutional and high-net-worth clients.
- **Principal Driven Orientation:** Significant principal investment by Connor, Clark & Lunn Financial Group provides a meaningful alignment of interests.



## VALUE THROUGH REAL ESTATE

Crestpoint Real Estate Investments Ltd. is a real estate investment manager dedicated to providing investors with direct access to commercial real estate assets and mortgage investments. Within its core plus real estate strategy, through the execution of a disciplined investment approach and active, hands-on strategic asset management, Crestpoint strives to deliver stable income and attractive long-term risk-adjusted returns by constructing a diversified portfolio of office, industrial, retail and multi-family residential properties located in Canada.

<b>Founded:</b>	2010
<b>Specialty:</b>	Real Estate
<b>Approach:</b>	Core Plus
<b>Products:</b>	<ul style="list-style-type: none"><li>• Real Estate</li><li>• Commercial Mortgages</li><li>• Opportunistic Real Estate</li></ul>
<b>Website:</b>	<a href="http://www.crestpoint.ca">www.crestpoint.ca</a>

The Crestpoint team combines a fundamental, value-oriented investment approach with independent research and insights, derived from years of experience to identify high quality, well located properties with sustainable income and cash flow and potential for long-term capital appreciation.

The Crestpoint mortgage strategy invests across the commercial mortgage risk spectrum primarily focused on private conventional and conventional plus mortgages secured against properties located in Canada with an opportunistic allocation to high yield mortgages and mezzanine loans. Crestpoint employs a structured and rigorous investment approach focused on capital preservation and maximizing risk adjusted returns. Our experience with real estate equity provides us with a competitive advantage when assessing credit risk and evaluating potential investment opportunities. The mortgage strategy is focused first and foremost on capital preservation and delivering consistent high income for our investors while differentiating ourselves with borrowers by providing flexibility, a common sense approach to underwriting as well as speed and ease of execution.

Whether evaluating a new property acquisition or lending opportunity, Crestpoint assesses each investment on its own merit and considers its impact on the broader respective portfolio, with the primary goal being to preserve capital and maximize risk-adjusted returns for clients.



## EMBRACING UNCERTAINTY. DELIVERING RESULTS.

FortWood Capital is an independent investment management firm dedicated to actively managed emerging markets credit investing. Our investment process combines macroeconomic analysis with detailed, security-level research, allowing us to identify market inefficiencies for superior risk-adjusted returns. By leveraging our deep industry expertise and robust risk management framework, we skillfully navigate complex markets and challenging environments to uncover value.

<b>Founded:</b>	2023
<b>Specialty:</b>	Emerging Market Credit
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"><li>• Emerging Markets Absolute Return Credit</li><li>• Emerging Markets Corporate Credit</li><li>• Emerging Markets Sovereign Credit</li></ul>
<b>Website:</b>	<a href="http://www.fortwoodcapital.com">www.fortwoodcapital.com</a>

Established in 2023 and based in Greenwich, Connecticut, FortWood Capital is built on the enduring strength and integrity symbolized by the historical fort at Liberty Island.

We specialize in the emerging markets credit space, providing clients with strategies supported by our extensive experience and hands-on history in these regions and markets.

We believe our investment team is our most valuable asset, working closely together with substantial experience in global credit markets.

Our team's synergy and cohesion enhance our understanding of emerging markets credit dynamics. We combine in-depth research, adaptability and a client-focused approach to effectively manage market complexities.



## SMALL CAP. GLOBAL. ALPHA.

Global Alpha Capital Management Ltd. is an investment management firm focused exclusively on global, international and emerging markets small cap portfolio management. The Global Alpha team conducts independent fundamental research to identify attractive investment opportunities in companies whose growth is unrecognized by the marketplace.

<b>Founded:</b>	2008
<b>Specialty:</b>	Small Capitalization Global, International and Emerging Markets
<b>Style:</b>	Core
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"><li>• Global Small Cap</li><li>• Sustainable Global Small Cap</li><li>• International Small Cap</li><li>• Emerging Markets Small Cap</li></ul>
<b>Website:</b>	<a href="http://www.globalalphacapital.com">www.globalalphacapital.com</a>

The investment team at Global Alpha believes the key to generating consistent added value over time is by creating portfolios using a global thematic perspective and a risk-controlled, low turnover approach.

Through bottom-up fundamental stock selection the team structures portfolios around distinct investment themes that identify the major long-term cyclical and structural influences in world economies and stock markets.

Global Alpha builds conviction-based portfolios intended to produce sustainable added value.

## MONEY MOVES MARKETS

Founded in 1988, NS Partners Ltd is an investment manager based in London, England. As a research driven active manager of global equities, NS Partners combines bottom-up fundamental company analysis with industry, sector and regional analyses. Its management style is core with a growth bias.

<b>Founded:</b>	1988
<b>Specialty:</b>	Global, International, European and Emerging Markets Equity, US Equity
<b>Style:</b>	Core/Growth
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"> <li>• Global Equity</li> <li>• Global Equity Focused</li> <li>• International Equity</li> <li>• International Equity Focused</li> <li>• ACWI ex-US Focused</li> <li>• Emerging Markets Equity</li> <li>• Sustainable Emerging Markets Equity</li> <li>• China Equity</li> <li>• Emerging Markets ex China Equity</li> <li>• European Equity</li> </ul>
<b>Website:</b>	<a href="http://www.ns-partners.co.uk">www.ns-partners.co.uk</a>

NS Partners Ltd is authorized and regulated by the UK Financial Conduct Authority.  
FRN: 141667. Registered in England and Wales Number 1880176

NS Partners' investment philosophy rests on the belief that liquidity and the supply and demand for equity drive markets.

The team utilizes the stock-picking skills of each of its portfolio managers, within their respective areas of specialization, to identify companies with distinct competitive advantages that generate a high or improving return on invested capital with good earnings momentum.

Placing emphasis on macro liquidity analysis for assessing the broad market environment and prospects for regional performance, they maintain a strategic bias to companies, industries and countries that have superior long-term growth potential.

The overall objective is to maximize exposure to the best market opportunities while keeping portfolios within acceptable risk tolerance levels and ensuring proper diversification of investment ideas.



## FUNDAMENTAL PERSPECTIVE FOCUSED ON GROWTH FROM THE BOTTOM UP

PCJ Investment Counsel Ltd. was formed in 1996 to provide specialty Canadian equity management. The team employs an active approach that blends an initial top-down perspective with bottom-up fundamental research focusing on stock selection and trading.

<b>Founded:</b>	1996
<b>Specialty:</b>	Canadian Equity
<b>Style:</b>	Growth
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"><li>• Canadian Equity</li><li>• Sustainable Canadian Equity</li><li>• Focused Opportunities</li><li>• Canadian Small Cap Equity</li><li>• Absolute Return</li></ul>
<b>Website:</b>	<a href="http://www.pcj.ca">www.pcj.ca</a>

PCJ's investment philosophy is grounded in the belief that:

- Market inefficiencies provide opportunities to add value
- Earnings growth ultimately drives stock prices
- Catalysts for organic growth are best identified through independent fundamental research

The investment management process begins with an evaluation of global economic conditions, with the objective of determining which areas of the market are poised to deliver the strongest medium-term performance. Securities are then selected on the basis of relative value within each sector, with a focus on growth characteristics such as earnings momentum, return on equity (ROE) and earnings per share (EPS) revision.



## DELIVERING QUALITY & VALUE CONSISTENTLY

For over 18 years Scheer, Rowlett & Associates Investment Management Ltd. has provided institutional investors with specialized Canadian equity investment management, adhering to a value-oriented style, along with exceptional client service.

<b>Founded:</b>	1992
<b>Specialty:</b>	Canadian Equity
<b>Style:</b>	Value
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"><li>• Canadian Equity</li><li>• Concentrated Canadian Equity</li><li>• Global Equity</li><li>• Balanced</li></ul>
<b>Website:</b>	<a href="http://www.scheerrowlett.com">www.scheerrowlett.com</a>

Scheer Rowlett believes that quality never goes out of style and that personal judgment matters. The team's philosophy is founded on the belief that inefficiencies in equity markets can be capitalized on over the mid to long term through patience and adherence to a value discipline.

Rather than trying to determine the next fad or time the markets, the team focuses on a company's earnings-ability, capital structure, management capability and competitive position in order to gain insights into the intrinsic value of the company.

The result is a portfolio of undervalued companies which is expected to outperform the broader market over a reasonable time period.

## LOCAL EXPERTISE. INSTITUTIONAL ACUMEN.

Vergent Asset Management LLP is an active investor in frontier and new emerging markets. Vergent aims to deliver long-term capital appreciation by investing in concentrated portfolios of quality companies operating in economies that are expected to experience significant and sustainable growth in economic profits over time.

<b>Founded:</b>	2018
<b>Specialty:</b>	Frontier and New Emerging Markets
<b>Style:</b>	Growth-at-a-Reasonable-Price (GARP)
<b>Approach:</b>	Fundamental
<b>Products:</b>	<ul style="list-style-type: none"><li>• Frontier Market Equity</li><li>• Middle East and North Africa (MENA) Equity</li></ul>
<b>Website:</b>	<a href="http://www.vergent-am.com">www.vergent-am.com</a>

With over 40 years of collective experience, the London-based team has a long track record of building frontier and regional equity portfolios for institutional investors. Portfolio companies are carefully selected based on rigorous fundamental research designed to identify inefficiencies and extract value in under-researched markets.

Using its strong network of business leaders, industry experts, research analysts, brokers, banks and regulators, Vergent collects information in markets characterized by informational scarcity and asymmetry. To further its competitive advantage, the team spends a significant amount of time conducting on-the-ground research in the markets in which it invests.

Vergent Asset Management LLP is authorized and regulated by the UK Financial Conduct Authority. FRN: 791909. Registered in England and Wales Number 0C418829.

*Whether you are looking for specific investment strategies, holistic portfolio solutions or our strategic advice services, we have the expertise to help you achieve your investment goals.*



## CONTACT OUR INSTITUTIONAL TEAM

Institutional sales representatives are located in Toronto, Vancouver, Montreal, Greenwich and London. We would welcome the opportunity to speak with you about your investment needs.

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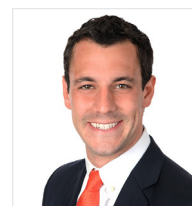
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Institutional sales representatives are located in Toronto, Vancouver, Montreal, Greenwich and London. We would welcome the opportunity to speak with you about your investment needs.



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Connor, Clark & Lunn Financial Group provides a broad range of traditional and alternative investment products and services to help create the conditions for success for individuals, advisors and institutional investors.



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FINANCIAL GROUP

[cclfg.cclgroup.com](http://cclfg.cclgroup.com)