

# ATB GLOBAL EQUITY POOL

Unlock a world of investment opportunity

## Fund profile

### ▶ Access to global markets

A one-ticket solution that provides the potential for attractive risk-adjusted returns with growth exposure by unlocking access to global investments in the world's fastest-growing economies and companies.

### ▶ Your passport to greater diversification

Canada comprises just 2%-3% of the global investment universe<sup>1</sup> with a domestic equity market concentrated in just three sectors. Looking outside our borders can help to achieve deeper diversification and long-term growth potential.

### ▶ Broaden your return potential

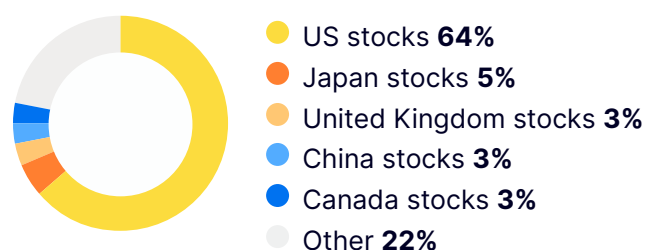
Provides enhanced diversification by geography, style, manager and sector, which helps to reduce risk while capturing growth opportunities as global investment markets evolve.

### ▶ World-class investments for an accessible minimum

An opportunity to benefit from high-conviction ideas from trusted, institutional-quality managers at an accessible entry point.

## Flexible, multi-manager approach

Actively investing in growth-oriented companies, diversified across regions, sectors, market capitalizations and manager styles, globally.



Reflects an asset mix as of June 2025 and is subject to change.

### Suitable for investors:

- Who have a long-term investment horizon
- Looking for long-term capital appreciation
- Willing to accept volatility in the value of their investments and medium investment risk
- Wanting a low-maintenance investment vehicle
- Wishing to diversify their exposure to global equities

## Professionally managed by the Multi-Asset Strategies Team

Our portfolio management team is there for clients throughout their investment journey, managing risk and rebalancing portfolios to help them reach their goals.



**Robert Armstrong,**  
**CFA, MBA, MSc**  
Head of Multi-Asset Strategies



**Steve Xu,**  
**CFA, FRM, CAIA**  
Senior Portfolio Manager

## Fund characteristics

Category	Global Equity
Risk rating	Medium
Management fee	Series A: 1.85% Series F1: 0.85%
Distribution frequency	Annually, in December
Benchmark	100% MSCI ACWI Index

	Series A	Series O	Series F1
Fund codes	ATB112	ATB212	ATB412

## Underlying building blocks for ATB Global Equity Pool

We've partnered with trusted independent managers to launch three underlying funds that are part of ATB Global Equity Pool. Each manager is a leader in their respective investment domain and brings a different perspective to the table. The pool will also have exposure to multiple exchange-traded funds (ETFs).



### Portfolio manager of the underlying ATB US Equity Fund

Independent asset management firm delivering active equity, fixed income and private markets solutions globally.



### Portfolio manager of the underlying ATB International Disciplined Equity Fund

Victory Capital investment franchise that delivers an array of actively managed equity solutions, specializing in growth, value and global strategies.

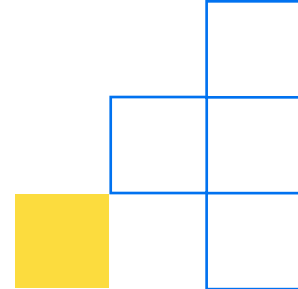


### Portfolio manager of the underlying ATB Emerging Markets Fund

Independent boutique investment manager providing strategies across US growth equities, international growth equities, emerging markets, global equities and alternative investments.

ATB Global Equity Pool:

# SEEK HIGHER GROWTH POTENTIAL WORLDWIDE



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<sup>1</sup>MSCI All Country World Index.

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