

# SUB-ADVISOR OVERVIEW

Connecting you to a world of investment experience

With ATB Investment Management, you benefit from the expertise of leading independent managers that we believe will produce strong risk-adjusted returns and outcomes over time. Our sub-advisors are selected and actively monitored using a disciplined institutional approach that's used by some of the world's largest investors —while giving our clients the right balance of risk, reward and value.

**Solutions  
strengthened  
by diversified  
perspectives**

## Sub-advisors for the Compass Portfolios and ATBIS Pools



### Investment managers



### Mortgage investment partner



# WE LEAD WITH INDEPENDENT INVESTMENT THINKING

Independence means the ability to choose the best investment managers for our portfolios and power greater possibilities for all Canadians.

## **Freedom to focus on world-leading investment thinkers that have:**

- A stable organizational structure
- A disciplined investment approach
- A strong track record

## **Freedom to source the best of both active and passive investment management:**

**Active investment** managers seek opportunities that earn higher risk-adjusted return over time.

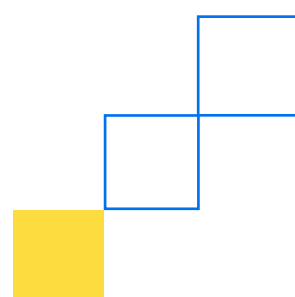
**Passive investments** are focused on replicating the performance of a specific index while complementing the active investments in a portfolio.

Our formula for success:

## **The expertise of independent sub-advisors combined with the strength of our in-house team**

While the external sub-advisors select individual investments, our portfolio managers monitor, manage and rebalance portfolios to capture opportunities and manage risk, while also diligently evaluating sub-advisors, by:

- Objectively monitoring sub-advisor activities on a regular basis
- Ensuring sub-advisors are delivering consistent value
- If necessary, replacing a sub-advisor if they stray from the investment style and/or principles they were selected on



# Learn more about our select lineup of sub-advisors that power the Compass Portfolios and ATBIS Pools

To learn more, please contact your ATBIM wholesaler.

**atbim.atb.com**

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