ATB INVESTMENT MANAGEMENT®

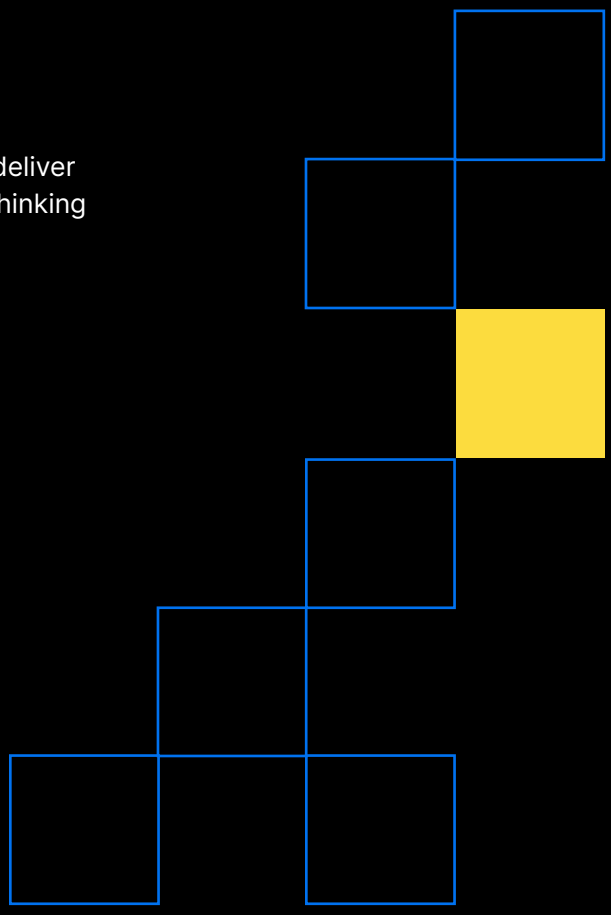
ATB INVESTMENT MANAGEMENT

Powering greater investment possibilities

WE LEAD WITH INDEPENDENT INVESTMENT THINKING

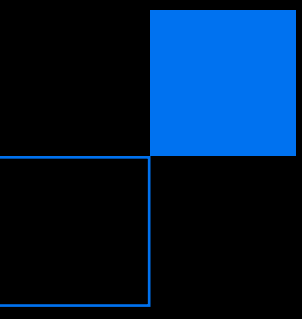
Our independent approach gives us the freedom to do things differently and make decisions that power greater investment possibility.

Built on a strong foundation of stability and longevity, we deliver sophisticated investment solutions with a fresh, forward-thinking approach—making them accessible to all Canadians.



Powering greater investment possibility

We are here to help Canadians dream bigger, face the markets with resilience and realize their visions of wealth. We do this by developing investment solutions in service of people and managing costs to maximize investor returns.



From our story to yours:

A HISTORY OF DOING RIGHT BY OUR INVESTORS

We are proud to be part of ATB Financial's 80-year history. ATBIM is an established firm with a 20+ year history of investing steadily through all types of markets with resilience.

ATBIM by the numbers

- **Over $25 billion in AUM** for individual and institutional investors[1]
- **Over two decades** investing through market cycles and part of ATB Financial's **80-year legacy**
- **Diversified** investment solutions, including **Compass Portfolios and ATBIS Pools**

[1] As of June 30, 2026.

Resilient investment strategies:

BALANCING VALUE, RISK AND REWARD

With a deliberate mix of active and passive investment management, we construct investment solutions that are truly resilient—helping investors navigate change and opportunity with confidence.

To guide our strong investment outcomes, we follow a consistent and disciplined philosophy:

- Begin with an effective asset mix.
- Succeed by managing risk through diversification—protecting investors from downside risk while cultivating growth potential.
- Thrive on our strong partnerships with select, specialized investment managers.
- Gain from our commitment to managing costs to help maximize investor returns.
- Embody discipline, simplicity and clarity in everything we do.

BRINGING A WORLD OF INVESTMENT LEADERSHIP TO YOUR BACKYARD

Our disciplined process gives us the freedom to select external investment talent who are the best at what they do. These partnerships with respected, high-quality investment managers enrich and complement the views of our in-house portfolio management team. Our portfolio management team uses a combination of top-down and bottom-up thinking to optimize portfolio weightings to evolving market dynamics and keep risk in check.

WHY ATB INVESTMENTS?

Stability with agility

We are not like traditional financial institutions, we are a bold new choice for Canadians.

Active management

We make active asset allocation and investment decisions, applied with a steady, consistent hand.

Discipline guided by experience

Our experienced managers construct portfolios using a disciplined, fundamentally driven investment approach.

Resilient, diversified investment solutions

We strive to develop strategic investment solutions that can help investors achieve a range of wealth and risk management goals.

Strong partnerships with leading investment managers

We access globally respected, high-quality independent investment managers to make our team stronger.

A richer toolkit for diversification

Our "open source" environment leads to richer diversification, including different investment managers, investment styles, asset classes, geographies and sectors.

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

POWERING THE WHOLE WEALTH ECOSYSTEM

We are committed to serving the whole wealth ecosystem, which begins by understanding the needs and challenges of advisors, investors and institutions.

Our range of flexible and customizable portfolios and investment solutions allow Canadians to have a deeper and richer toolkit to build their wealth—whether for individuals, institutions and businesses of all sizes.

The investment solutions we create are designed to serve real people and drive real outcomes, balancing risk, reward and value.

DISCOVER WHAT'S POSSIBLE WITH ATB INVESTMENT MANAGEMENT

To learn more, please visit **atbim.atb.com**.

ATB INVESTMENT MANAGEMENT®

ATB Investment Management® (ATBIM) and design are registered trademarks of ATB Financial. ATBIM is registered as a Portfolio Manager across various Canadian securities commissions with the Alberta Securities Commission (ASC) being its principal regulator. ATB Investment Management Inc. is also registered as an Investment Fund Manager who manages the ATB Funds. ATBIM is a wholly owned subsidiary of ATB Financial and is a licensed user of the registered trademark ATB Wealth.

REV.10/2026