ATB INVESTMENT MANAGEMENT®

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

Partnerships for the ATB Funds

BostonPartners

Canso Investment Counsel Ltd

Cardinal Capital Management

Cidel

Driehaus Capital Management

Fiera Capital*

Foyston, Gordon & Payne Inc. Investment Counsel

Goldman Sachs

Mawer Be Boring. Make Money.®

Picton Investments

RS Investments® A Victory Capital® Investment Franchise

Investment managers

BlackRock**

BMO Global Asset Management***

Mortgage investment partner

cmls asset management

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:

- An institutional focus
- A stable organizational structure
- A disciplined investment approach
- A strong track record
- A business-focused investment process

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 ATB Funds

To learn more, please contact your ATBIM wholesaler.

atbim.atb.com

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