# SUN LIFE GLOBAL INVESTMENTS

# BY THE NUMBERS



- We work with **institutional managers** to offer mandates not available elsewhere in Canada to retail investors
- SLGI: \$53 billion AUM¹
- Sun Life: \$1.33 trillion in global AUM
- Sun Life: 150+ years of growing & protecting wealth for Canadians (Since 1865)
- Scale = pricing power & broad global reach
- Insurance roots = **strong risk management** culture



# Products that solve for more dimensions of risk

LONGEVITY • INVESTMENT • MARKET • INFLATION • MORTALITY

Mutual Funds | Segregated Funds | Payout Annuities | GICs | Insurance GICs



# **Breadth of capabilities**

# Internal capabilities:

Managed solutions | Tactical asset allocation | Derivatives | Private Pools

# **Sub-advised capabilities:**

Canadian fixed income | High yield & corporate bonds | Emerging markets bonds Canadian equity | U.S. equity | International equity | Global equity | Emerging markets equity | Real assets

<sup>1</sup>AUM as of December 31, 2022. Includes Institutional, Mutual Funds, Payout Annuities, Insurance GICs, Trust GICs, and Sun Life GIFs. Institutional mandates are sub-advised by SLGI and offered as segregated funds by Sun Life Assurance Company of Canada through Group Retirement Services.

# A sub-advisor network spanning the globe: • Amundi • Birla • BlackRock • Dynamic • JPMorgan • KBIGI • Lazard • MFS • Nuveen • Schroders • SLC Management • Wellington

management

oversight



### SUN LIFE GLOBAL INVESTMENTS BY THE NUMBERS

# **IMPORTANT POINTS IN OUR HISTORY**

# 2010

# Sun Life Global Investments is founded.

Hires MFS Investment Management to sub-advise a number of mandates. The inaugural fund family also includes four Milestone funds, Sun Life's brand of target-date funds.

## 2012

## Launches Sun Life Granite Managed Portfolios. Broad diversification, tactical asset allocation and world-class asset managers.

# 2015

Sun Life Assurance Company launches **Sun Life GIFs.** A suite of segregated fund contracts offering the benefits of protection and potential for investment growth.

# 2018

### Acquires Excel Funds Management Inc. and Excel Investment Counsel Inc.

Launches **Sun Life Tactical ETF Portfolios.** Risk-managed portfolios offering exposure to ETFs in a convenient mutual fund structure – for fee sensitive investors.

# 2020

Launches **Sun Life Private Investment Pools.** Five uniquely engineered and competitively priced solutions, built for the future.

Mutual funds and insured wealth solutions under one umbrella. With this range of choices, we solve for more dimensions of risk

# 2013

Launches Sun Life Granite Managed Income Portfolios.

# 2017

Announces sponsorship of Cirque du Soleil®. We are proud to be the Presenting Partner of Cirque du Soleil in Canada.

# 2022

Sun Life Granite Managed Solutions celebrates a decade of growth.

Launches its first sustainable mandate: Sun Life KBI Sustainable Infrastructure Private Pool.

Sun Life GIFs are individual variable annuity contracts issued by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies. Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value.

MFS Investment Management or MFS refers to MFS Investment Management Canada Limited and MFS Institutional Advisors, Inc.

All values in CAD unless noted otherwise.

Sun Life Global Investments is a trade name of SLGI Asset Management Inc., Sun Life Assurance Company of Canada, and Sun Life Financial Trust Inc.

SLGI Asset Management Inc. is the investment manager of the Sun Life Mutual Funds, Sun Life Granite Managed Solutions and Sun Life Private Investment Pools. Sun Life Assurance Company of Canada is the issuer of guaranteed insurance contracts, including Accumulation Annuities (Insurance GICs), Payout Annuities, and Individual Variable Insurance Contracts (Sun Life GIFs). Sun Life Financial Trust Inc. is the issuer of Sun GIC Max and Guaranteed Investment Certificates.

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