

# SUN LIFE GLOBAL INVESTMENTS BY THE NUMBERS



- We work with **institutional managers** to offer mandates not available elsewhere in Canada to retail investors
- SLGI: **\$55+ billion** AUM<sup>1</sup>
- Sun Life: **\$1.5+ trillion** in global AUM<sup>2</sup>
- 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 | Global fixed income  
Canadian equity | U.S. equity | International equity | Global equity  
Emerging markets equity | Real assets | Alternative investments

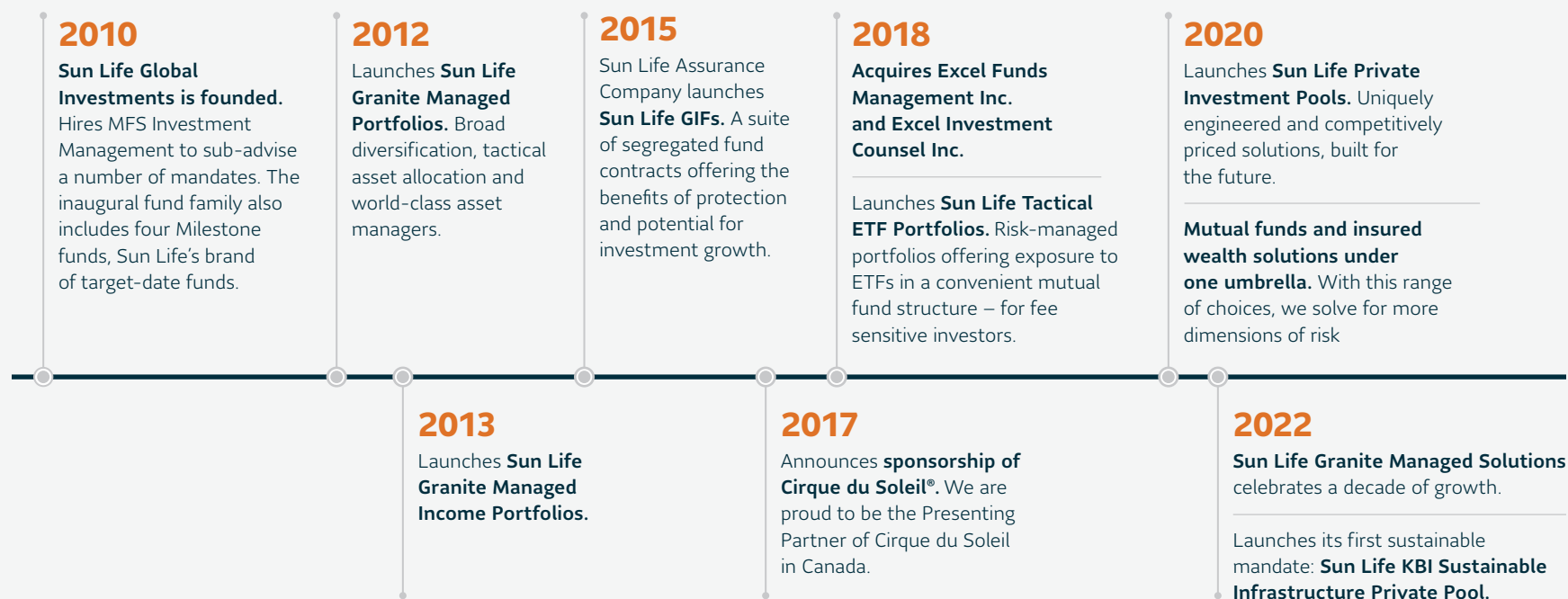


<sup>1</sup> As of March 31, 2024. Includes Institutional, Mutual Funds, Payout Annuities, Insurance GICs, Trust GICs, and Sun Life GIFs. Institutional mandates are sub-advised by Sun Life Global Investments and offered as segregated funds by Sun Life Assurance Company of Canada through Group Retirement Services.

<sup>2</sup> As of December 31, 2024.

All values in CAD unless noted otherwise.

# IMPORTANT POINTS IN OUR HISTORY



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.

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 GIFs), 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.

© SLGI Asset Management Inc., Sun Life Assurance Company of Canada, and their licensors, 2025. SLGI Asset Management Inc. and Sun Life Assurance Company of Canada are members of the Sun Life group of companies. All rights reserved.