

PORTFOLIO CONSTRUCTION & INVESTMENT STRATEGY

Collaborative partnerships with advisors to enable
best-in-class investment management practices

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Portfolio Construction and Investment Strategy

As your Portfolio Construction and Investment Strategy team (PCIS), we strive to provide quality strategic intelligence on asset allocation, risk management, and investment factors tailored to support your practice.

01

Asset Allocation

Asset allocation is often the primary determinant of a portfolio's investment return and volatility. Timely guidance may be tactical or strategic depending on advisor investment philosophy and approach.

02

Risk Management

Broad diversification represents one of the best ways to reduce overall portfolio risk without sacrificing anticipated returns. Diversification across investment strategies, asset management providers, asset classes, and ultimately risk factor exposures should be subject to rigorous scrutiny.

03

Investment Factors

Assessing and understanding drivers of market returns is central to our customized approach. We use powerful analytics and risk models to help enable you to make better investment decisions, ultimately leading to more robust model portfolios.

04

Manager Research

Access information to help you evaluate and monitor funds. Our monthly reports cover thousands of actively managed mutual funds covering all investable asset classes.

You can count on us to support your portfolio construction process to help you achieve your clients' specific investment outcomes.

Offerings for our partners

Advisors that partner with Sun Life Global Investments (SLGI) can enhance their process for building portfolios as well as gaining insights to help demonstrate your value to your clients, thereby growing and enhancing your business.

Investment Beliefs Questionnaire

Developing an investment beliefs statement is best practice for helping you make investment recommendations. They ensure there is a general framework within which your investment strategies are established, your investment ideas are reviewed, and your investment decisions are implemented.

Model Portfolio Construction & Optimization

We work with you to create custom portfolios that align potential outcomes with the goals and risk tolerance of your client groups. We begin with investment goals, then asset allocation, followed by investment structure to capture asset class and factor-based drivers of returns, and finally fund selection.

Factor and Risk Exposure Analysis

Bespoke model portfolio analysis. Using underlying funds and weights we can deconstruct factors and exposures that are most important to a portfolios' risk and return profile. This comparative analysis helps evaluate and establish reasonable rate-of-return and risk expectations based on different market environments.

Consolidation Guidance

As an advisor you are required to have sufficient knowledge of every security you recommend. Having too many unique investment products compounds this challenge. We can provide insightful data to support consolidation efforts, that reduces your KYP workload and saves valuable time.



Badan Fong

Badan Fong has been a key member of Sun Life Global Investments national distribution team since his arrival in 2022. He is currently Wealth Portfolio Strategist on SLGI's Portfolio Construction & Investment Strategy Team (PCIS), and is an Associate Portfolio Manager with SLGI's multi-asset solutions team. Badan works directly with advisors across Canada to help them meet the investment needs of their clients. An experienced former financial planner and advisor, Badan has over 17 years of industry experience in wealth and asset management and is an authority on portfolio construction, investment manager research and performance analysis. Badan received his Bachelor of Commerce from Ryerson University. He is a CFA charterholder and has completed the CFP education curriculum.

About Sun Life Global Investments

Sun Life Global Investments offers Canadians a diverse lineup of mutual funds, portfolio solutions and guaranteed investments, empowering them to pursue their financial goals at every life stage. We bring together the strength of one of Canada's most trusted names in financial services with some of the best asset managers from around the world to deliver a truly global investment platform. For more information, please visit sunlifeglobalinvestments.com.



For more information, contact your Wealth Sales Team or:

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Portfolio Analyzer is a tool used by SLGI Asset Management Inc. to provide advisors with detailed analytics and visualizations to quantify and display performance and risk levels in model portfolios and the source of those risks, enabling them to construct more robust model portfolios for their clients. Any reports produced by the Portfolio Analyzer tool are not intended to represent tax, legal, insurance or investment advice. Information in this video or the reports produced by Portfolio Analyzer should not be considered an indication of trading intent of any mutual funds managed by SLGI Asset Management Inc. and are not a recommendation to buy or sell any security. SLGI Asset Management Inc. does not manage the portfolios depicted in the reports produced by the Portfolio Analyzer for individual investors.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the fund's prospectus. Mutual funds are not guaranteed, their values change frequently, and past performance may not be repeated.

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