

# Delivering actively managed institutional portfolio capabilities to Canadian investors

Time to read: 5 minutes

## Sun Life Global Investments Multi-Asset Solutions Team

### Deep expertise to back your portfolio

The Sun Life Global Investments Multi-Assets Solutions Team (MAS) has managed institutional and retail portfolios for over a decade. The team dedicates 100% of their time to fund manager selection, oversight, and building managed solutions for Canadian investors through rigorous research-oriented investment process. We make institutional mandates accessible for retail participation through our Granite Managed Solutions and other strategies overseen by the MAS Team.

Bringing together a talented group, the team has close to 200 years of combined investment experience. Their goal is to create favourable outcomes for investors no matter what life stage or goal they are working towards.

### Philosophy

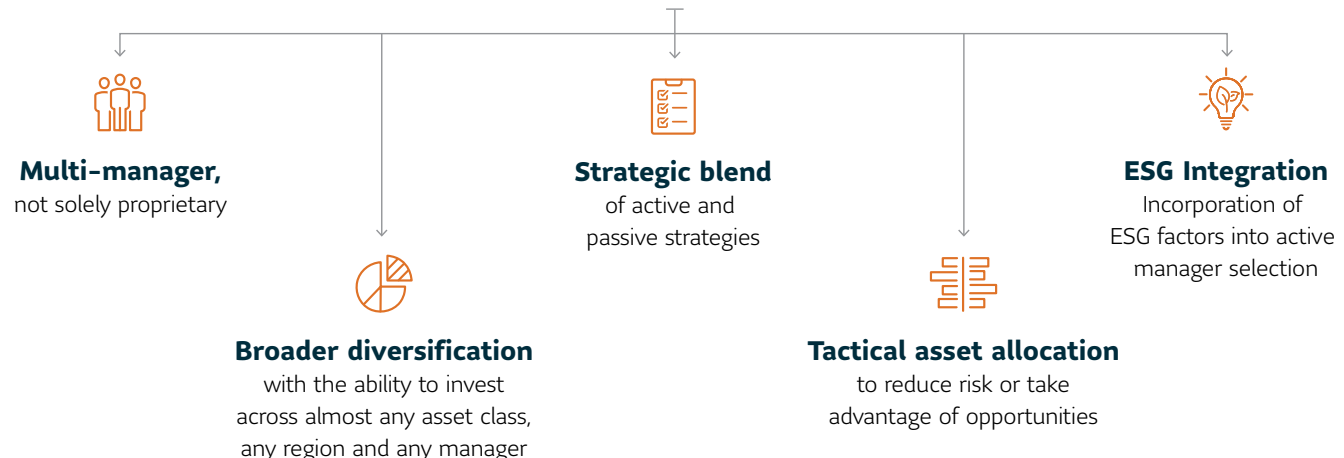
No single company can be the best in every single investment category. Sub-advisor selection is based on the potential to enhance risk adjusted returns, provide global diversification, and preserve capital.

### Strength of MAS

#### Key differentiators

- Open architecture
- Rigorous manager screening and selection
- Building managed solutions for Canadian investors
- ESG integration
- Tactical asset allocation

## Building portfolios with more sources of return



## Multi-manager approach

They research and analyze fund managers from around the globe—and they only invest with fund managers they believe to be the best in each category. The team is not bound by any proprietary limitations or contractual obligations.

## Broader Diversification

We offer broader diversification by region, style, manager, sector, and asset class – with tactical asset allocation.



## Tactical decisions

Market reactions are often irrational, which creates disruptions that may change the current risk/reward profile of certain asset classes from longer-term expectations. When market conditions present such opportunities, the MAS Team can, in most of the portfolios they manage, temporarily deviate from the strategic allocation to reduce risk or take advantage of opportunities. And it is not a binary decision. Over 30 independent decision points (across three levers: asset mix, asset style and asset class) factor into the top-down tactical view.

## Integration of ESG within Granite Portfolios

Sun Life Global Investments considers environmental, social and governance (ESG) factors to be an increasingly important component of the investment manager selection and oversight process. We believe that ESG factors may materially affect the financial performance of individual securities. As such, we have formalized our philosophy, objectives, implementation and governance for our approach to ESG and have expanded on our ESG considerations when engaging in manager selection and oversight. For more information please visit <https://www.sunlifeglobalinvestments.com/en/about-us/responsible-investing/>

## Strategic asset categories

Fixed Income	Specialty Fixed Income	Equity	Specialty Equity
<ul style="list-style-type: none"> <li>• Cash</li> <li>• Domestic Bonds</li> <li>• U.S. Bonds</li> <li>• Global Bonds</li> </ul>	<ul style="list-style-type: none"> <li>• High Yield</li> <li>• Emerging Markets Debt</li> </ul>	<ul style="list-style-type: none"> <li>• Domestic Equity</li> <li>• U.S. Equity</li> <li>• International Equity</li> <li>• Global Small-Mid cap</li> <li>• Emerging Markets Equity</li> </ul>	<ul style="list-style-type: none"> <li>• Global Listed Infrastructure</li> <li>• Global Real Estate Investment Trusts (REIT)</li> <li>• Global Natural Resources</li> </ul>

INVESTMENT STYLES

ACTIVE | PASSIVE

GROWTH | VALUE | CORE

# An experienced team with a singular focus – to help you achieve investor goals



## **Chhad Aul, MSC, CFA**

Chief Investment Officer and Head of Multi-Asset Solutions, SLGI Asset Management Inc.

*Joined industry in 2004*

*Joined firm in 2014*

- Chhad is responsible for the development, evolution and execution of the investment philosophy, process and investment team
- Chairs the Asset Allocation Committee and Investment Oversight Committee and leads the activities of the MAS team to drive performance and manage risk
- Previously was Vice-President and Senior Portfolio Manager at State Street Global Advisors where he managed a broad number of equity strategies – from traditional long-only funds to alternative strategies and hedge funds



## **Aly Somani, CFA, CPA CA**

Portfolio Manager, SLGI Asset Management Inc.

*Joined industry in 2007*

*Joined firm in 2012*

- Aly is a member of the Asset Allocation Committee, using his skills and experience to support the committee's strategic and tactical asset allocation, quantitative modeling, and derivative strategies
- Previously Aly spent four years in public accounting where he observed how large organizations use derivatives and other financial instruments to achieve various objectives



## **Christine Tan, CFA, CPA CA**

Portfolio Manager, SLGI Asset Management Inc.

*Joined industry in 1997*

*Joined firm in 2018*

- Christine is a member of the Investment Oversight Committee and the Asset Allocation Committee, and serves as portfolio manager on several of the team's strategies and funds
- Prior to joining Sun Life Global Investments, Christine was Chief Investment Officer and Senior Portfolio Manager at Excel Investment Counsel Inc., Vice President and Portfolio Manager at Gluskin Sheff + Associates



### Anthony Wu, CFA

Portfolio Manager, SLGI Asset Management Inc.

*Joined industry in 2009*

*Joined firm in 2015*

- Anthony is as a member of the Asset Allocation Committee, providing global macro and cross-asset research to the committee and serves as portfolio manager on several of the team’s strategies and funds
- Responsible for overseeing operational aspect of portfolio implementation, working collaboratively with operations, traders, and external managers to resolve issues as well as mentoring junior team members
- Previously Anthony was an Associate at Segal Rogerscacey Canada and provided oversight to private wealth platforms and conducted due diligence on external managers across all asset classes.



### Jason Zhang, CFA

Portfolio Manager  
SLGI Asset Management Inc.

*Joined industry in 2007*

*Joined firm in 2022*

- Jason is a member of the Asset Allocation Committee and a portfolio manager for our Granite series of funds and other select strategies
- Brings more than a decade of comprehensive experience in multi-asset portfolio management an in-depth understanding of macroeconomic principles and global capital markets, manager research and selection, and asset/liability modeling
- Previously Jason was a Managing Director, Portfolio Manager, Multi-Asset Solution Team, at Manulife Investment Management, providing day-to-day monitoring and portfolio management of the multi-asset solutions team’s Canadian-based asset allocation portfolios

**189** combined years of industry experience

Chhad Aul	19	Christine Tan	26
Jason Zhang	16	Aly Somani	16
Anthony Wu	14	Maral Dolmadjian	18
Jenifer Rush	26	Adelina Romanelli	27
Mark Chiaravalle	13	Sahil Dhingra	8
Pedro Cadavid	6		

# Investment solutions

## Mutual funds

Fund name
Sun Life Granite Conservative Portfolio
Sun Life Granite Conservative Class
Sun Life Granite Moderate Portfolio
Sun Life Granite Moderate Class
Sun Life Granite Balanced Portfolio
Sun Life Granite Balanced Class
Sun Life Granite Balanced Growth Portfolio
Sun Life Granite Balanced Growth Class
Sun Life Granite Growth Portfolio
Sun Life Granite Growth Class
Sun Life Granite Income Portfolio
Sun Life Granite Enhanced Income Portfolio
Sun Life Tactical Fixed Income ETF Portfolio
Sun Life Tactical Conservative ETF Portfolio
Sun Life Tactical Balanced ETF Portfolio
Sun Life Tactical Growth ETF Portfolio
Sun Life Tactical Equity ETF Portfolio
Sun Life Milestone 2025 Fund**
Sun Life Milestone 2030 Fund
Sun Life Milestone 2035 Fund
Sun Life Multi-Strategy Bond Fund
Sun Life Global Tactical Yield Private Pool
Sun Life Real Assets Private Pool

Prospectus Risk Level

● Low ● Low to Medium

## Segregated funds

Fund name
Sun GIF Solutions Sun Life Granite Conservative Investment Series
Sun GIF Solutions Sun Life Granite Conservative Estate Series
Sun GIF Solutions Sun Life Granite Moderate Investment Series
Sun GIF Solutions Sun Life Granite Moderate Estate Series
Sun GIF Solutions Sun Life Granite Balanced Investment Series
Sun GIF Solutions Sun Life Granite Balanced Estate Series
Sun GIF Solutions Sun Life Granite Balanced Growth Investment Series
Sun GIF Solutions Sun Life Granite Balanced Growth Estate Series
Sun GIF Solutions Sun Life Granite Growth Investment Series
Sun GIF Solutions Sun Life Granite Growth Estate Series
Sun GIF Solutions Sun Life Granite Income Investment Series
Sun GIF Solutions Sun Life Granite Income Estate Series
Sun GIF Solutions Sun Life Granite Enhanced Income Investment Series
Sun GIF Solutions Sun Life Granite Enhanced Income Estate Series
Sun GIF Solutions Sun Life Tactical Fixed Income ETF Investment Series
Sun GIF Solutions Sun Life Tactical Fixed Income ETF Estate Series
Sun GIF Solutions Sun Life Tactical Conservative ETF Investment Series
Sun GIF Solutions Sun Life Tactical Conservative ETF Estate Series
Sun GIF Solutions Sun Life Tactical Balanced ETF Investment Series
Sun GIF Solutions Sun Life Tactical Balanced ETF Estate Series
Sun GIF Solutions Sun Life Tactical Growth ETF Investment Series
Sun GIF Solutions Sun Life Tactical Growth ETF Estate Series
Sun GIF Solutions Sun Life Tactical Equity ETF Investment Series
Sun GIF Solutions Sun Life Tactical Equity ETF Estate Series
Sun GIF Solutions Sun Life Global Tactical Yield Private Pool Investment Series
Sun GIF Solutions Sun Life Global Tactical Yield Private Pool Estate Series

Info Folder Risk Level

● Low ● Low to Medium

## Get to know the Sun Life group of companies better

Sun Life Global Investments benefits from the strength of Sun Life's asset management capabilities:

- CAD \$1.33 trillion+ in AUM globally (December 31, 2022)
- 150+ years helping Canadians grow and protect wealth
- Our scale means pricing power and a broader global reach
- Insurance roots instil a strong risk-management culture
- Sun Life Global Investments makes institutional mandates available to individual investors

Talk to your Sun Life Wealth Sales Director today about how **Sun Life Managed Solutions** can help you meet your investment goals.



For more information, contact your Wealth Sales Team or:

Visit [sunlifeglobalinvestments.com](https://sunlifeglobalinvestments.com) | Call **1-877-344-1434**

\*as of June 30, 2023

\*\*Effective March 6, 2023, Sun Life Milestone 2025 Fund is closed to new investments. Any accounts that already hold securities of Sun Life Milestone 2025 Fund are permitted to continue to hold, purchase, and/or switch-in additional securities of the Fund. Existing pre-authorized chequing plans are permitted to continue to purchase securities of the Fund.

SLGI Asset Management Inc. is the investment manager of the Sun Life family of mutual funds. 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.

Sun Life Assurance Company of Canada is the issuer of accumulation annuities (insurance GICs), payout annuities and individual variable annuity contracts (segregated fund contracts). 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. Sun Life Financial Trust Inc. is the issuer of guaranteed investment certificates.

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. all of which are members of the Sun Life group of companies.

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