New Business Development in Institutional Asset Management – Canada

2019 Canadian Institutional Investors Research

January 17, 2020

Executive Summary:

This report provides detailed information from institutional investors in Canada on new business activity from key issues for plan sponsors and other institutional investors to solicitation trends.

Methodology:

This research is based on personal interviews conducted from July through October 2019 with 220 of the largest tax-exempt funds in Canada.

Total assets exceed $1 trillion. Senior fund professionals were asked to provide quantitative and qualitative evaluations of their investment managers, qualitative assessments of those managers soliciting their business, and detailed information on important market trends.

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