2023 Key Trends in the Canadian Institutional Investment Consulting Business

Canadian Institutional Investors Research

May 17, 2024

Executive Summary:

Review the market position of leading investment consultancies in Canada employed by influential institutional investors.

Methodology:

This research is based on in-depth interviews conducted from February through November 2023 with 156 of the largest tax-exempt funds in Canada.

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

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