Expected Allocation Shifts in Institutional Asset Management – Canada

2018 Canadian Institutional Investors Research

January 23, 2019

Executive Summary:

This report provides detailed information from institutional investors in Canada on expected shifts over the medium term in allocation changes.

Methodology:

This research is based on personal interviews conducted from July through October 2018 with 221 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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