

# Investor Situations & Needs in Institutional Asset Management – Canada

2019 Canadian Institutional Investors Research

January 18, 2020

Executive Summary:

This report provides detailed information from institutional investors in Canada on return expectations, funding ratios and much more.

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.

The data reported in this document reflect solely the views reported to Greenwich Associates by the research participants. Interviewees may be asked about their use of and demand for financial products and services and about investment practices in relevant financial markets. Greenwich Associates compiles the data received, conducts statistical analysis and reviews for presentation purposes in order to produce the final results. Unless otherwise indicated, any opinions or market observations made are strictly our own.

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