



# insight

to build investments **that work**

Sun Life  GLOBAL  
Investments

I N S T I T U T I O N A L

# INNOVATIVE INVESTMENT SOLUTIONS

Sun Life Global Investments offers a broad and growing selection of investment mandates to choose from. Our experienced Portfolio Management Team builds and manages multi-manager asset allocation funds that provide plan members with a choice of investment solutions to match their risk profiles and investment time horizons.

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The Sun Life Financial Granite Funds are unique in that they deliver broad diversification by asset class, geographic region, industry, manager and style, while also incorporating niche asset classes such as real estate and infrastructure, and a mix of passive and active investments.

## SUN LIFE FINANCIAL GRANITE TARGET DATE FUNDS

Choice of eight diversified funds, with maturity dates in five-year increments from 2020 – 2055, and a retirement fund. These funds are managed to become more conservative as the target date approaches and are ideal for members who have a defined date for when they want to access their investments.

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## SUN LIFE FINANCIAL GRANITE TARGET RISK FUNDS

Choice of five diversified funds ranging from conservative to aggressive, designed for members to match their risk tolerance to a diversified portfolio solution that aligns with their investment objectives.

## SUN LIFE FINANCIAL GRANITE MULTI-RISK TARGET DATE FUNDS

Choice of three risk profiles: conservative, moderate and aggressive. Within each risk profile there are eight diversified funds with maturity dates in 5-year increments, from 2020 – 2055, and a retirement fund. Members simply choose a fund based on their risk tolerance and time horizon. Each fund becomes more conservative as the target date approaches.

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## SUN LIFE FINANCIAL GRANITE MANAGED INCOME FUNDS

Choice of two diversified income-oriented funds based on plan members' risk tolerance. These funds hold investments that focus on generating a consistent level of income for the fund.

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## SUN LIFE FINANCIAL MILESTONE FUNDS

Choice of eight target date funds with maturity dates in five-year increments from 2020 – 2055. The Sun Life Milestone Funds are unique in that they provide members with a guaranteed maturity value when held to maturity. This guarantee can provide peace of mind for members who find it challenging to stay invested through volatile markets.

These asset allocation solutions are available on Sun Life's Group Retirement Services platform.

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Sun Life Global Investments delivers expert management and innovative investment solutions to the Canadian institutional marketplace. As part of the Sun Life Financial group of companies, including Canada's leader in group retirement savings plans<sup>1</sup>, we have deep insight into plan member trends and investment behaviour. This insight allows us to develop investment solutions that can help members meet their long-term financial goals.

<sup>1</sup> Benefits Canada magazine, January 2016.

## SUITE OF SELECT STANDALONE MANDATES

In addition to these exclusive asset allocation solutions, our global reach extends to the management of the following standalone mandates. Sun Life Global Investments has partnered with some of the best asset managers from around the world to manage the following investment solutions for our clients:

ASSET MANAGER	ASSET CLASS
Aviva Investors	Absolute Return
BlackRock	Canadian Equity • Canadian Balanced
Bridgehouse Asset Managers <sup>2</sup>	Canadian Small Cap Equity
Dynamic Funds	Diversified Income
MFS <sup>3</sup>	Money Market • Global Equity • International Equity • U.S. Equity
Multi-manager <sup>4</sup>	Canadian Bond
Sentry Investments	Canadian Equity • Global Small Cap Equity • Infrastructure
Schroders	Emerging Markets Equity

## SUPERIOR INVESTMENT CAPABILITIES

Sun Life Global Investments follows a **rigorous research and selection process** to select asset managers for our investment platform. Our disciplined investment process helps us identify managers who have demonstrated a repeatable investment process, with superior long-term performance.

Our investment team benefits from the **support of Sun Life Financial's International Investment Centre**, an internal group that provides independent investment research, product development and consulting services to Sun Life Financial globally. Sun Life Global Investments leverages the International Investment Centre's research and insight when selecting and monitoring managers and funds for our platform, and for the development and continuous review of the asset mix for our asset allocation solutions.

**Risk management is key** to all our investment decisions. Adherence to strict investment guidelines with multiple layers of oversight helps ensure our investment solutions – and the funds they invest in – are managed in accordance with their long-term investment objectives.

## COMMITMENT TO SERVICE EXCELLENCE

Sun Life Global Investments is dedicated to providing best-in-class investment solutions and quality service to our clients. Our investment team is committed to providing regular fund reviews and capital market updates.

In collaboration with Sun Life Financial Group Retirement Services, plan sponsors and their members will benefit from seamless implementation and ongoing support through member education and tools that will help your members make informed investment decisions when planning for their financial future.

SUN LIFE GLOBAL INVESTMENTS

## SUN LIFE GLOBAL INVESTMENTS QUICK FACTS

- Head office in Toronto, Ontario, Canada
- Over 125 asset manager relationships worldwide through Sun Life's International Investment Centre
- Access to research on over 4,000 asset managers worldwide
- 26 investment solutions available to plan sponsors
- Both sub-advised and in-house managed investment solutions



CONTACT US TO LEARN MORE ABOUT HOW  
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[www.sunlifeglobalinvestments.com/institutional](http://www.sunlifeglobalinvestments.com/institutional)

<sup>2</sup> Bridgehouse Asset Managers has hired Sionna Investment Managers Inc. as portfolio sub-advisor for the Sun Life Sionna Canadian Equity Small Cap Fund.

<sup>3</sup> MFS refers to both MFS Institutional Advisors Inc., and MFS Investment Management Canada Limited, both sub-advisors to funds of the Sun Life Global Investments (Canada) Inc. platform.

<sup>4</sup> Effective May 2, 2016, Sun Life Financial Universe Bond Fund moved to a multi-strategy approach. The Fund's assets will be allocated amongst four underlying managers: BlackRock Asset Management; Connor, Clark & Lunn Investment Management Ltd. (as sub-advisor), Franklin Templeton Investments and Phillips, Hager & North Investment Management.

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