

# insight

## to build investments that work

Sun Life Global Investments brings together the strength of one of Canada's most trusted names in financial services, Sun Life Financial, with some of the best asset managers from around the world to offer a lineup of innovative, world-class investment solutions.

With deep insight into plan member trends and investment behaviour, we have the resources to develop investment solutions to help your plan members reach their long-term financial goals.



### **STRONG INVESTMENT CAPABILITIES**

Through a rigorous research process, we identify and select asset managers who demonstrate a repeatable investment process and superior long-term performance.

Risk management is key to all our investment decisions and we adhere to strict investment guidelines. By having multiple layers of oversight, we strive to ensure our investment solutions – and the funds they invest in – are managed according to their investment objectives.

### **A COMMITMENT TO SERVICE EXCELLENCE**

Sun Life Global Investments is dedicated to providing best-in-class investment solutions and quality service to our clients.

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

### **AT A GLANCE**

Head office in  
Toronto, Ontario

Over 125 asset  
manager relationships  
worldwide through  
Sun Life's International  
Investment Centre

Access to research  
from over 4,000 asset  
managers worldwide

26 investment options  
available to  
plan sponsors

Both sub-advised  
and in-house  
managed investment  
solutions

Sun Life  **GLOBAL  
Investments**

INSTITUTIONAL

# Our institutional platform

Sun Life Global Investments offers a variety of both in-house and sub-advised investment options through Sun Life Financial Group Retirement Services:

## CANADIAN FIXED INCOME

- Sun Life Money Market
- Sun Life Financial Universe Bond (multi-strategy<sup>1</sup>)

## DIVERSIFIED INCOME

- Sun Life Dynamic Equity Income
- Sun Life Dynamic Strategic Yield

## BALANCED

- Sun Life BlackRock Canadian Balanced

## CANADIAN EQUITY

- Sun Life BlackRock Canadian Equity
- Sun Life Sentry Value
- Sun Life Sionna Canadian Small Cap Equity

## FOREIGN EQUITY

- Sun Life MFS Global Growth
- Sun Life MFS Global Value<sup>2</sup>
- Sun Life MFS International Growth
- Sun Life MFS International Value<sup>3</sup>
- Sun Life MFS Low Volatility International Equity
- Sun Life MFS U.S. Growth
- Sun Life MFS U.S. Growth Hedged
- Sun Life MFS U.S. Value
- Sun Life MFS U.S. Value Hedged
- Sun Life MFS U.S. Equity
- Sun Life Schroder Emerging Markets

## ABSOLUTE RETURN

- Sun Life Multi-Strategy Target Return Fund (Aviva Investors)

## ASSET ALLOCATION

- Sun Life Financial Milestone Funds 2020 to 2055
- Sun Life Financial Granite Target Date Funds 2020 to 2055 and a Retirement Fund
- Sun Life Financial Granite Multi-Risk Target Date Funds 2020 to 2055, and a Retirement Fund – 3 levels of risk: Conservative, Moderate, Aggressive
- Sun Life Financial Granite Target Risk Funds – 5 series
- Sun Life Granite Managed Income Portfolios – 2 levels of income

<sup>1</sup>The Fund's assets are allocated amongst four underlying managers: BlackRock Asset Management; Connor, Clark & Lunn Investment Management Ltd. (as sub-advisor); Franklin Templeton Investments and Philips, Hager & North Investment Management. <sup>2</sup> Closed to new plans, effective January 31, 2017. <sup>3</sup> Closed to new plans, effective January 28, 2016.

To learn more about how Sun Life Global Investments can complement your offering visit:

[WWW.SUNLIFEGLOBALINVESTMENTS.COM/INSTITUTIONAL](http://WWW.SUNLIFEGLOBALINVESTMENTS.COM/INSTITUTIONAL)

Sun Life Financial Group Retirement Services offers plan sponsors and their members a lineup of segregated funds. These are established in accordance with the Insurance Companies Act (Canada) and may contain securities of mutual or pooled funds managed by various investment managers, including Sun Life Global Investments (Canada) Inc. or the segregated funds may hold securities that are invested on a sub-advisory basis by investment managers including Sun Life Global Investments (Canada) Inc. Management fees and expenses are associated with segregated funds and will be disclosed to you by Group Retirement Services. Mutual fund and segregated fund performance is not guaranteed; their values change frequently and past performance may not be repeated.



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