

# LSEG Lipper Fund Awards

## CANADA 2024 WINNERS

GROUP AWARD	SIZE	COMPANY
Bond		Leith Wheeler Investment Counsel
Equity		Bridgehouse
Mixed Assets		Canoe Financial
Overall		SEI

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
2035+ Target Date Portfolio	3 Years	Fidelity ClearPath® 2045 Portfolio - Series F	Fidelity Investments Canada ULC	16
Canadian Corporate Fixed Income	3 Years	Leith Wheeler Corporate Advantage Fund Series F	LEITH WHEELER INVESTMENT COUNSEL LTD.	12
Canadian Dividend & Income Equity	3 Years	Lysander-Crusader Equity Income Fund - Series F	Lysander Funds Ltd. Advised by Crusader Asset Management Inc.	58
Canadian Equity	3 Years	EdgePoint Canadian Portfolio Series F(N)	EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	88
Canadian Equity Balanced	3 Years	EdgePoint Canadian Growth & Income Portfolio Series F(N)	EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	47
Canadian Fixed Income	3 Years	Dynamic Tactical Bond Private Pool - Series FH	1832 Asset Management LP	91
Canadian Fixed Income Balanced	3 Years	CIBC U.S. Dollar Managed Income Portfolio - Class A units	Canadian Imperial Bank of Commerce Advised by CIBC Asset Management Inc	73
Canadian Focused Equity	3 Years	Invesco EQV Canadian Premier Equity Class Series PTF	Invesco Canada Ltd	63
Canadian Focused Sm/Mid Cap Eq	3 Years	Brandes Canadian Equity Fund - Series F	Brandes Investment Partners & Co.	10
Canadian Neutral Balanced	3 Years	Invesco Canadian Premier Balanced Series F	Invesco Canada Ltd	46

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
Canadian Short Term Fixed Income	3 Years	NBI Floating Rate Income Fund Series FT	National Bank Investments Inc. Advised by National Bank Trust Inc	38
Canadian Small/Mid Cap Equity	3 Years	Franklin ClearBridge Canadian Small Cap Fund Series F	Franklin Templeton Investments Corp	33
Emerging Markets Equity	3 Years	RBC Emerging Markets Equity Focus Fund FT5	RBC Global Asset Management Inc	43
Energy Equity	3 Years	CI Global Energy Corporate Class Series P	CI Global Asset Management	10
European Equity	3 Years	AGF European Equity Class Series F	Agf Investments Inc/ Placements Agf Inc	19
Floating Rate Loan	3 Years	Fidelity Floating Rate High Income - Series F	Fidelity Investments Canada ULC	11
Global Corporate Fixed Income	3 Years	Lysander-Canso U.S. Corporate Value Bond Fund (USD) Series F	Lysander Funds Ltd. Advised by CANSO INVESTMENT COUNSEL LTD.	18
Global Dividend & Income Equity	3 Years	BMO Global Dividend Fund - Series F	BMO Investments Inc Advised by Guardian Capital LP	28
Global Equity	3 Years	CI Global Climate Leaders Fund Series PH	CI Global Asset Management	224
Global Equity Balanced	3 Years	CI U.S. Equity & Income Fund Series PH	CI Global Asset Management	169
Global Fixed Income	3 Years	PIMCO Low Duration Monthly Income Fund (Canada) US\$ Series F	PIMCO Canada Corp	63
Global Fixed Income Balanced	3 Years	CI U.S. Income US\$ Fund Series P	CI Global Asset Management	103
Global Infrastructure Equity	3 Years	Renaissance Global Infrastructure Fund - Class F units	CIBC Asset Management Inc	15
Global Neutral Balanced	3 Years	Dynamic Global Yield Private Pool - Series FH	1832 Asset Management LP	190
Global Small/Mid Cap Equity	3 Years	Brandes Global Small Cap Equity Fund - Series F	Brandes Investment Partners & Co.	33
High Yield Fixed Income	3 Years	Pender Corporate Bond Fund Class U	Penderfund Capital Management Ltd.	41
International Equity	3 Years	Brandes International Equity Fund - Series F	Brandes Investment Partners & Co.	84
Multi-Sector Fixed Income	3 Years	PIMCO Monthly Income Fund (Canada) - Series F (US\$) Hedged	PIMCO Canada Corp	41
Natural Resources Equity	3 Years	Purpose Global Resource Fund F	Purpose Investments Inc	20
North American Equity	3 Years	TD North American Dividend Fund FT8 Series	TD Asset Management Inc	22
Precious Metals Equity	3 Years	IG Mackenzie Global Precious Metals Fund - Series F	IG Investment Management Ltd	11

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Preferred Share Fixed Income	3 Years	Dynamic Preferred Yield Class - Series F	1832 Asset Management LP	11
Real Estate Equity	3 Years	DFA Global Real Estate Securities Fund - Class F	Dimensional Fund Advisors Canada ULC	15
Sector Equity	3 Years	IG Mackenzie Global Science & Technology Fund Series F	IG Investment Management Ltd	20
Tactical Balanced	3 Years	Manulife Tactical Income Fund - Series F	Manulife Investment Management Ltd	52
US Dividend & Income Equity	3 Years	IA Clarington U.S. Dividend Growth Fund - Series F	IA Clarington Investments Inc Advised by iA Global Asset Management Inc	21
US Equity	3 Years	Capital Group U.S. Equity Fund™ (Canada) Series F	Capital International Asset Management Canada Inc Advised by Capital Research and Management Co	137
US Small/Mid Cap Equity	3 Years	BMO U.S. Small Cap Fund - Series F	BMO Investments Inc Advised by Columbia Management Investment Advisers LLC	26
2035+ Target Date Portfolio	5 Years	Fidelity ClearPath® 2045 Portfolio - Series F	Fidelity Investments Canada ULC	12
Canadian Corporate Fixed Income	5 Years	Leith Wheeler Corporate Advantage Fund Series F	LEITH WHEELER INVESTMENT COUNSEL LTD.	11
Canadian Dividend & Income Equity	5 Years	Invesco Canadian Plus Dividend Class Series PTF	Invesco Canada Ltd	57
Canadian Equity	5 Years	EdgePoint Canadian Portfolio Series F(N)	EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	79
Canadian Equity Balanced	5 Years	EdgePoint Canadian Growth & Income Portfolio Series F(N)	EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	45
Canadian Fixed Income	5 Years	CI Global Core Plus Bond Fund Series P	CI Global Asset Management	82
Canadian Fixed Income Balanced	5 Years	Compass Conservative Balanced Portfolio - Series F1	ATB Investment Management Inc.	72
Canadian Focused Equity	5 Years	Canoe Equity Portfolio Class - Series F	Canoe Financial LP	61
Canadian Focused Sm/Mid Cap Eq	5 Years	Brandes Canadian Equity Fund - Series F	Brandes Investment Partners & Co.	10
Canadian Neutral Balanced	5 Years	CI Canadian Balanced Fund Series P	CI Global Asset Management	45
Canadian Short Term Fixed Income	5 Years	NBI Floating Rate Income Fund Series FT	National Bank Investments Inc. Advised by National Bank Trust Inc	35
Canadian Small/Mid Cap Equity	5 Years	Renaissance Canadian Small-Cap Fund - Class F units	CIBC Asset Management Inc	32
Emerging Markets Equity	5 Years	Canada Life Emerging Markets Large Cap Equity Fund I	Canada Life Investment Management Ltd	38
European Equity	5 Years	BMO European Fund - Series F	BMO Investments Inc Advised by Columbia Threadneedle Management Ltd	19

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Floating Rate Loan	5 Years	CI Floating Rate Income Fund Series P	CI Global Asset Management	11
Global Corporate Fixed Income	5 Years	Lysander-Canso U.S. Corporate Value Bond Fund (USD) Series F	Lysander Funds Ltd. Advised by CANSO INVESTMENT COUNSEL LTD.	17
Global Dividend & Income Equity	5 Years	CI Global Dividend Fund Series P	CI Global Asset Management	27
Global Equity	5 Years	NBI Innovators Fund Investor Series	National Bank Investments Inc. Advised by National Bank Trust Inc	197
Global Equity Balanced	5 Years	IG Mackenzie U.S. Dividend Registered Fund Series F	IG Investment Management Ltd	158
Global Fixed Income	5 Years	PIMCO Low Duration Monthly Income Fund (Canada) US\$ Series F	PIMCO Canada Corp	43
Global Fixed Income Balanced	5 Years	Chou Bond Fund - Series F	CHOU ASSOCIATES MANAGEMENT INC.	92
Global Infrastructure Equity	5 Years	Ninepoint Global Infrastructure Fund Series D	Ninepoint Partners LP	13
Global Neutral Balanced	5 Years	TD U.S. Monthly Income Fund FT5 Series US\$	TD Asset Management Inc	168
Global Small/Mid Cap Equity	5 Years	Brandes Global Small Cap Equity Fund - Series F	Brandes Investment Partners & Co.	29
High Yield Fixed Income	5 Years	Pender Corporate Bond Fund Class U	Penderfund Capital Management Ltd.	39
International Equity	5 Years	Canada Life International Concentrated Equity Fund I	Canada Life Investment Management Ltd	74
Multi-Sector Fixed Income	5 Years	CI Global Unconstrained Bond Fund Series F	CI Global Asset Management	38
Natural Resources Equity	5 Years	IG Mackenzie Global Resource Fund - Series F	IG Investment Management Ltd	20
North American Equity	5 Years	Fidelity North American Equity Class - Series F8	Fidelity Investments Canada ULC	18
Precious Metals Equity	5 Years	IG Mackenzie Global Precious Metals Fund - Series F	IG Investment Management Ltd	11
Preferred Share Fixed Income	5 Years	Dynamic Preferred Yield Class - Series F	1832 Asset Management LP	10
Real Estate Equity	5 Years	Dynamic Global Real Estate Fund - Series F	1832 Asset Management LP	14
Sector Equity	5 Years	Fidelity Technology Innovators Fund Series F	Fidelity Investments Canada ULC	19
Tactical Balanced	5 Years	Canoe Asset Allocation Portfolio Class - Series F	Canoe Financial LP	52
US Dividend & Income Equity	5 Years	Phillips, Hager & North U.S. Dividend Income Fund - Series F	RBC Global Asset Management Inc	21

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US Equity	5 Years	Scotia U.S. Equity Fund - Series F	1832 Asset Management LP	127
US Small/Mid Cap Equity	5 Years	BMO U.S. Small Cap Fund - Series F	BMO Investments Inc Advised by Columbia Management Investment Advisers LLC	24
Canadian Dividend & Income Equity	10 Years	Dynamic Canadian Dividend Fund - Series F	1832 Asset Management LP	49
Canadian Equity	10 Years	EdgePoint Canadian Portfolio Series F(N)	EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	61
Canadian Equity Balanced	10 Years	Manulife Fundamental Balanced Class - Series FT6	Manulife Investment Management Ltd	43
Canadian Fixed Income	10 Years	Ridgewood Tactical Yield Fund Series A	Ridgewood Capital Asset Management Inc	63
Canadian Fixed Income Balanced	10 Years	Compass Conservative Balanced Portfolio - Series F1	ATB Investment Management Inc.	59
Canadian Focused Equity	10 Years	Manulife Fundamental Equity Fund - Series FT6	Manulife Investment Management Ltd	57
Canadian Neutral Balanced	10 Years	RBC Managed Payout Solution-Enhanced Plus Fund - Series F	RBC Global Asset Management Inc	43
Canadian Short Term Fixed Income	10 Years	Lysander-Canso Short Term and Floating Rate Fund - Series F	Lysander Funds Ltd. Advised by CANSO INVESTMENT COUNSEL LTD.	34
Canadian Small/Mid Cap Equity	10 Years	NBI Quebec Growth Fund Series F	National Bank Investments Inc. Advised by National Bank Trust Inc	31
Emerging Markets Equity	10 Years	Fidelity Emerging Markets Fund - Series F	Fidelity Investments Canada ULC	27
European Equity	10 Years	BMO European Fund - Series F	BMO Investments Inc Advised by Columbia Threadneedle Management Ltd	18
Global Dividend & Income Equity	10 Years	FERIQUE World Dividend Equity Fund Series A	Gestion Ferique	18
Global Equity	10 Years	NBI Innovators Fund Investor Series	National Bank Investments Inc. Advised by National Bank Trust Inc	133
Global Equity Balanced	10 Years	Fidelity Global Growth Portfolio Series F	Fidelity Investments Canada ULC	107
Global Fixed Income	10 Years	IG Core Portfolio - Global Income Series F	IG Investment Management Ltd	25
Global Fixed Income Balanced	10 Years	Fidelity Global Income Portfolio - Series F	Fidelity Investments Canada ULC	55
Global Infrastructure Equity	10 Years	IG Mackenzie Global Infrastructure Fund - Series F	IG Investment Management Ltd	11
Global Neutral Balanced	10 Years	TD U.S. Monthly Income Fund F Series US\$	TD Asset Management Inc	119
Global Small/Mid Cap Equity	10 Years	Renaissance Global Small-Cap Fund - Class F units	CIBC Asset Management Inc	21

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High Yield Fixed Income	10 Years	Pender Corporate Bond Fund Class F	Penderfund Capital Management Ltd.	31
International Equity	10 Years	Sun Life MFS International Opportunities Fund Series O	SLGI Asset Management Inc	53
Multi-Sector Fixed Income	10 Years	PIMCO Monthly Income Fund (Canada) - Series F (US\$) Hedged	PIMCO Canada Corp	19
Natural Resources Equity	10 Years	Mackenzie Global Resource Fund Series F	Mackenzie Financial Corp	18
North American Equity	10 Years	TD North American Dividend Fund FT8 Series	TD Asset Management Inc	11
Precious Metals Equity	10 Years	Dynamic Precious Metals Fund - Series F	1832 Asset Management LP	11
Real Estate Equity	10 Years	Dynamic Global Real Estate Fund - Series F	1832 Asset Management LP	12
Sector Equity	10 Years	Fidelity Technology Innovators Fund Series F	Fidelity Investments Canada ULC	13
Tactical Balanced	10 Years	Fidelity Tactical High Income Fund - Series F8	Fidelity Investments Canada ULC	31
US Dividend & Income Equity	10 Years	RBC U.S. Dividend Fund - Series F	RBC Global Asset Management Inc	14
US Equity	10 Years	Scotia Nasdaq Index Fund - Series F	1832 Asset Management LP	104
US Small/Mid Cap Equity	10 Years	RBC U.S. Mid-Cap Growth Equity Fund - Series F	RBC Global Asset Management Inc	21

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