

CANADA 2025 WINNERS

GROUP AWARD	SIZE	COMPANY
Bond		Guardian Capital
Equity		Capital Group
Mixed Assets		Capital Group
Overall		Capital Group

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
Canadian Core Plus Fixed Income	3 Years	CIBC Core Fixed Income Pool Series F Units	CIBC Asset Management Inc	23
Canadian Corporate Fixed Income	3 Years	NBI Floating Rate Income Fund Series FT	National Bank Investments Inc.	20
Canadian Dividend & Income Equity	3 Years	BMO Growth & Income Fund - Series F	BMO Investments Inc Advised by Guardian Capital LP	58
Canadian Equity	3 Years	Guardian Canadian Focused Equity Fund - Series F	Guardian Capital LP	92
Canadian Equity Balanced	3 Years	Dynamic Power Balanced Fund - Series FT	1832 Asset Management LP	47
Canadian Fixed Income	3 Years	Russell Investments Fixed Income Pool US Dollar Hedged Series F	Russell Investments Canada Limited	60
Canadian Fixed Income Balanced	3 Years	BMO Monthly Dividend Fund Ltd. - Series F	BMO Investments Inc Advised by Guardian Capital LP	67
Canadian Focused Equity	3 Years	Fidelity Canadian Growth Company Fund - Series F	Fidelity Investments Canada ULC	63
Canadian Neutral Balanced	3 Years	Invesco Canadian Premier Balanced Series F	Invesco Canada Ltd	49
Canadian Short Term Fixed Income	3 Years	Fidelity Canadian Short Term Corporate Bond ETF Fund Series F	Fidelity Investments Canada ULC	29

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
Canadian Small/Mid Cap Equity	3 Years	Matco Opportunities Fund - Series F	MATCO FINANCIAL INC.	31
Emerging Markets Equity	3 Years	Brandes Emerging Markets Value Fund - Series F	Brandes Investment Partners & Co.	43
Energy Equity	3 Years	Canoe Energy Income Portfolio Class - Series F	Canoe Financial LP	10
European Equity	3 Years	AGF European Equity Class Series F	AGF Investments Inc/ Placements AGF Inc	15
Floating Rate Loan	3 Years	Renaissance Floating Rate Income Fund - Class F units	CIBC Asset Management Inc	11
Global Core Plus Fixed Income	3 Years	PIMCO Low Duration Monthly Income Fund (Canada) - Series F(US\$)	PIMCO Canada Corp	43
Global Corporate Fixed Income	3 Years	Pender Bond Universe Fund Class F (US\$)	Penderfund Capital Management Ltd.	28
Global Dividend & Income Equity	3 Years	CI Global Dividend Fund Series P	CI Investments Inc	27
Global Equity	3 Years	CI Munro Global Growth Equity Fund Series PH	CI Investments Inc	243
Global Equity Balanced	3 Years	Fidelity Multi-Asset Innovation Fund - Series F	Fidelity Investments Canada ULC	175
Global Fixed Income	3 Years	PIMCO Global Short Maturity Fund (Canada) - Series F(US\$)	PIMCO Canada Corp	28
Global Fixed Income Balanced	3 Years	Capital Group Emerging Markets Total Opportunities Fund™ (Canada) - Series F	Capital International Asset Management Canada Inc	115
Global Infrastructure Equity	3 Years	NBI Global Real Assets Income Fund - Series F	National Bank Investments Inc.	18
Global Neutral Balanced	3 Years	Scotia U.S. \$ Balanced Fund - Series F	1832 Asset Management LP	203
Global Small/Mid Cap Equity	3 Years	Brandes Global Small Cap Equity Fund - Series F	Brandes Investment Partners & Co.	31
High Yield Fixed Income	3 Years	Purpose Global Flexible Credit Fund non-currency hedged Series F	Purpose Investments Inc	35
International Equity	3 Years	Brandes International Equity Fund - Series F	Brandes Investment Partners & Co.	81
Multi-Sector Fixed Income	3 Years	Pender Corporate Bond Fund - Class U	Penderfund Capital Management Ltd.	44
Natural Resources Equity	3 Years	Purpose Global Resource Fund Series F	Purpose Investments Inc	19
North American Equity	3 Years	Purpose Best Ideas Fund Series F Non-FX Hedged	Purpose Investments Inc	25
Precious Metals Equity	3 Years	Mackenzie Precious Metals Fund - Series F	Mackenzie Financial Corp	11

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
Preferred Share Fixed Income	3 Years	NBI Preferred Equity Fund - Series F	National Bank Investments Inc.	11
Real Estate Equity	3 Years	Middlefield Real Estate Dividend Class Series F	Middlefield Ltd	15
Sector Equity	3 Years	CI Global Alpha Innovators Corporate Class Series PH	CI Investments Inc	11
Tactical Balanced	3 Years	Dynamic Premium Balanced Private Pool Class - Series F	1832 Asset Management LP	49
US Dividend & Income Equity	3 Years	Middlefield U.S. Equity Dividend Class Series F	Middlefield Ltd	20
US Equity	3 Years	Fidelity U.S. Growth Opportunities Class Series F5	Fidelity Investments Canada ULC	138
US Small/Mid Cap Equity	3 Years	RBC U.S. Mid-Cap Growth Equity Fund - Series F	RBC Global Asset Management Inc	29
Canadian Core Plus Fixed Income	5 Years	CIBC Core Fixed Income Pool Series F Units	CIBC Asset Management Inc	20
Canadian Corporate Fixed Income	5 Years	NBI Floating Rate Income Fund Series FT	National Bank Investments Inc.	18
Canadian Dividend & Income Equity	5 Years	BMO Growth & Income Fund - Series F	BMO Investments Inc Advised by Guardian Capital LP	55
Canadian Equity	5 Years	Guardian Canadian Focused Equity Fund - Series F	Guardian Capital LP	79
Canadian Equity Balanced	5 Years	EdgePoint Canadian Growth & Income Portfolio Series F(N) Units	EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	44
Canadian Fixed Income	5 Years	Russell Investments Fixed Income Pool US Dollar Hedged Series F	Russell Investments Canada Limited	55
Canadian Fixed Income Balanced	5 Years	BMO Monthly Dividend Fund Ltd. - Series F	BMO Investments Inc Advised by Guardian Capital LP	65
Canadian Focused Equity	5 Years	Scotia Canadian Growth Fund - Series F	1832 Asset Management LP	60
Canadian Neutral Balanced	5 Years	TD Canadian Diversified Yield Fund D Series	TD Asset Management Inc	46
Canadian Short Term Fixed Income	5 Years	Dynamic Ultra Short Term Bond Fund - Series F	1832 Asset Management LP	27
Canadian Small/Mid Cap Equity	5 Years	IG Beutel Goodman Canadian Small Cap Fund - Series F	IG Investment Management Ltd	31
Emerging Markets Equity	5 Years	Brandes Emerging Markets Value Fund - Series F	Brandes Investment Partners & Co.	34
European Equity	5 Years	AGF European Equity Class Series F	AGF Investments Inc/ Placements AGF Inc	15
Floating Rate Loan	5 Years	Fidelity Floating Rate High Income Fund - Series F	Fidelity Investments Canada ULC	11

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
Global Core Plus Fixed Income	5 Years	PIMCO Low Duration Monthly Income Fund (Canada) - Series F(US\$)	PIMCO Canada Corp	35
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.	20
Global Dividend & Income Equity	5 Years	CI Global Dividend Fund Series P	CI Investments Inc	27
Global Equity	5 Years	ROMC Trust Fund Series F	Mclean Asset Management Ltd	198
Global Equity Balanced	5 Years	CI Dividend Income & Growth Fund Series P	CI Investments Inc	151
Global Fixed Income	5 Years	PIMCO Global Short Maturity Fund (Canada) - Series F(US\$)	PIMCO Canada Corp	21
Global Fixed Income Balanced	5 Years	Chou Bond Fund - Series F	CHOU ASSOCIATES MANAGEMENT INC.	93
Global Infrastructure Equity	5 Years	BMO Global Infrastructure Fund - Series F	BMO Investments Inc Advised by BMO Asset Management Inc	14
Global Neutral Balanced	5 Years	TD U.S. Monthly Income Fund FT5 Series US\$	TD Asset Management Inc	169
Global Small/Mid Cap Equity	5 Years	Brandes Global Small Cap Equity Fund - Series F	Brandes Investment Partners & Co.	27
High Yield Fixed Income	5 Years	Purpose Strategic Yield Fund - Series UF	Purpose Investments Inc	31
International Equity	5 Years	Brandes International Equity Fund - Series F	Brandes Investment Partners & Co.	76
Multi-Sector Fixed Income	5 Years	Pender Corporate Bond Fund - Class U	Penderfund Capital Management Ltd.	40
Natural Resources Equity	5 Years	Purpose Global Resource Fund Series F	Purpose Investments Inc	19
North American Equity	5 Years	Fidelity North American Equity Class - Series F8	Fidelity Investments Canada ULC	21
Precious Metals Equity	5 Years	Mackenzie Precious Metals Fund - Series F	Mackenzie Financial Corp	11
Preferred Share Fixed Income	5 Years	Dynamic Preferred Yield Class - Series F	1832 Asset Management LP	11
Real Estate Equity	5 Years	Middlefield Real Estate Dividend Class Series F	Middlefield Ltd	14
Sector Equity	5 Years	Fidelity Technology Innovators Fund Series F	Fidelity Investments Canada ULC	11
Tactical Balanced	5 Years	Dynamic Premium Balanced Private Pool Class - Series F	1832 Asset Management LP	48
US Dividend & Income Equity	5 Years	CI U.S. Dividend Registered Fund Series P	CI Investments Inc	20

LIPPER GLOBAL CLASSIFICATION		BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
US Equity	5 Years	AGF American Growth Fund Series F		AGF Investments Inc/ Placements AGF Inc	126
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 Core Plus Fixed Income	10 Years	Invesco Canadian Core Plus Bond Fund Series PTF		Invesco Canada Ltd	15
Canadian Corporate Fixed Income	10 Years	IG Mackenzie Canadian Corporate Bond Fund - Series F		IG Investment Management Ltd	15
Canadian Dividend & Income Equity	10 Years	Phillips, Hager & North Dividend Income Fund - Series F		RBC Global Asset Management Inc	47
Canadian Equity	10 Years	Mackenzie Canadian Equity Fund Series F		Mackenzie Financial Corp	62
Canadian Equity Balanced	10 Years	EdgePoint Canadian Growth & Income Portfolio Series F(N) Units		EdgePoint Wealth Management Inc. Advised by EDGEPOINT INVESTMENT GROUP INC.	43
Canadian Fixed Income	10 Years	Sun Life MFS Canadian Bond Fund - Series O		SLGI Asset Management Inc	47
Canadian Fixed Income Balanced	10 Years	Compass Conservative Balanced Portfolio - Series F1		ATB Investment Management Inc.	53
Canadian Focused Equity	10 Years	Capital Group Canadian Focused Equity Fund (Canada) - Series F		Capital International Asset Management Canada Inc Advised by Capital Research and Management Co	56
Canadian Neutral Balanced	10 Years	RBC Managed Payout Solution-Enhanced Plus Fund - Series F		RBC Global Asset Management Inc	44
Canadian Short Term Fixed Income	10 Years	IG Core Portfolio - Income - Series F		IG Investment Management Ltd	25
Canadian Small/Mid Cap Equity	10 Years	NBI Quebec Growth Fund Series F		National Bank Investments Inc.	29
Emerging Markets Equity	10 Years	Templeton Emerging Markets Fund - Series F		Franklin Templeton Investments Corp	23
European Equity	10 Years	BMO European Fund - Series F		BMO Investments Inc Advised by Columbia Threadneedle Management Ltd	14
Global Core Plus Fixed Income	10 Years	NEI Global Total Return Bond Fund Series F		Northwest & Ethical Investments LP	17
Global Corporate Fixed Income	10 Years	Lysander-Canso U.S. Corporate Value Bond Fund (USD) Series F		Lysander Funds Ltd. Advised by CANSO INVESTMENT COUNSEL LTD.	11
Global Dividend & Income Equity	10 Years	RBC Global Dividend Growth Fund - Series F		RBC Global Asset Management Inc	20
Global Equity	10 Years	AGF Global Select Fund Series F		AGF Investments Inc/ Placements AGF Inc	138
Global Equity Balanced	10 Years	Fidelity Global Growth Portfolio - Series F5		Fidelity Investments Canada ULC	114
Global Fixed Income	10 Years	Manulife Strategic Investment Grade Global Bond Fund - Series F		Manulife Investment Management Ltd	13

LIPPER GLOBAL CLASSIFICATION	BEST FUND	FUND NAME	FUND MANAGEMENT COMPANY	PORTFOLIO COUNT
Global Fixed Income Balanced	10 Years	Fidelity Global Income Portfolio - Series F	Fidelity Investments Canada ULC	61
Global Infrastructure Equity	10 Years	CI Global Infrastructure Fund Series P	CI Investments Inc	11
Global Neutral Balanced	10 Years	TD U.S. Monthly Income Fund F Series US\$	TD Asset Management Inc	126
Global Small/Mid Cap Equity	10 Years	Renaissance Global Small-Cap Fund Class F units	CIBC Asset Management Inc	20
High Yield Fixed Income	10 Years	Purpose Strategic Yield Fund - Series UF	Purpose Investments Inc	26
International Equity	10 Years	Sun Life MFS International Opportunities Fund - Series O	SLGI Asset Management Inc	53
Multi-Sector Fixed Income	10 Years	Pender Corporate Bond Fund - Class F	Penderfund Capital Management Ltd.	26
Natural Resources Equity	10 Years	IG Mackenzie Global Resource Fund - Series F	IG Investment Management Ltd	19
North American Equity	10 Years	RBC North American Growth Fund - Series F	RBC Global Asset Management Inc	13
Precious Metals Equity	10 Years	Mackenzie Precious Metals Fund - Series F	Mackenzie Financial Corp	11
Real Estate Equity	10 Years	CI Canadian REIT Fund Series F	CI Investments Inc	12
Tactical Balanced	10 Years	Scotia Diversified Balanced Fund - Series F	1832 Asset Management LP	33
US Dividend & Income Equity	10 Years	Phillips, Hager & North U.S. Dividend Income Fund - Series F	RBC Global Asset Management Inc	16
US Equity	10 Years	Scotia Nasdaq Index Fund - Series F	1832 Asset Management LP	103
US Small/Mid Cap Equity	10 Years	RBC U.S. Mid-Cap Growth Equity Fund - Series F	RBC Global Asset Management Inc	20