

# Investment Overview

Expertise, Stewardship, Impact



When you make a gift to establish your endowed fund at the Mississauga Foundation, you are joining with donors all across our community who are creating lasting and sustainable support for all kinds of charitable causes. We hope this helpful information might answer many of the questions you have about our investment activity, but you are welcome to contact us if you have additional questions.

## Objectives

The Mississauga Foundation's objective is to generate a total investment return that maximizes grant distributions, recovers the cost of managing and administering the funds, preserves inter-generational equity and stabilizes grant-making.

## Options

Most donors prefer that their gift is added to the pooled fund. However, donors making a gift of \$500k or more can request that their gift of funds be managed by specific Investment Manager(s) within the Foundation's Professional Investment Advisor (PIA) program. These gifts must meet the guidelines outlined in the Foundation's policies.

## Investment Committee

The Investment Committee is a standing committee of the Board and must be chaired by a member of the Board. It is made up of industry professionals who volunteer their time to share their extensive knowledge and oversight. The Committee is responsible for monitoring manager compliance with policies, reporting performance to the Board, reviewing manager performance and asset allocation and providing recommendations regarding the Investment Policy.

## Investment Manager

In 2013, the Foundation employed Connor, Clark & Lunn Private Capital as the manager of the pooled fund. CC&L Private Capital was established in 1997 and is part of Connor, Clark & Lunn Financial Group. CC&L Financial Group is the second largest independently owned asset manager in Canada and collectively manages over \$40 billion in assets on behalf of individuals and institutional investors. The company's web site is [www.cclprivatecapital.com](http://www.cclprivatecapital.com)

## Asset Allocation

Asset Class	Benchmark Allocation (%)	Permissible Range (%)
Cash and Cash Equivalents	5	0-15
Fixed Income Instruments	30	15-45
<b>Total Fixed Income</b>	<b>35</b>	<b>15-60</b>
Canadian Equities	30	15-45
Global Equities	35	20-45
<b>Total Equities</b>	<b>65</b>	<b>40-75</b>
<b>Total Alternative Strategies</b>	<b>0</b>	<b>0-40</b>

## Calendar Year Returns (%)

2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
15.4	9.8	-5.7	13.7	12.7	15.2	-2.2	7.7	7.0	7.4	9.7	18.6

