

EMPIRE LIFE GLOBAL GROWTH GIF*

Global exposure with a growth focus

Why this fund



The Return Potential of Growth Investing

- An actively managed fund with a focus on disruptive businesses and growing market segments to identify opportunities for significant growth.



Multifaceted Research Process

- Rigorous focus on fundamentals augmented by frequent meetings with management, business/industry subject matter experts and macroeconomic research to ensure the portfolio contains only the Portfolio Manager's highest conviction growth-focused ideas.



Experienced Investment Team

- Senior Portfolio Managers with demonstrated experience managing global equities, supported by a team of growth-focused analysts.

*Available in Empire Life GIF segregated fund contracts.

Diversifying your portfolio to benefit from changing market conditions

Looking back over several different market cycles, we can clearly see that growth and value perform differently depending on the prevailing market condition. Having exposure to both investment styles can help ensure diversification through market cycles.

The interrelationship between growth and value-oriented stocks

3-year rolling returns vs. MSCI World Index



Source: Morningstar Research Inc. as at September 30, 2023. Start date of illustration is December 31, 1977. The graph illustrates the excess returns of the MSCI Growth Index against the MSCI World Index and the MSCI Value Index against the MSCI World Index.

Gain exposure to some of the most valuable growth companies in the world



Long-term secular drivers for growth



Global Innovation Engine

- Semiconductor investment
- Generative Artificial Intelligence



Energy Transition

- Drive to decarbonize
- Electric vehicle investment



Re-onshoring Manufacturing Jobs

- Driven by geo-political derisking
- Supportive for capital investments



India's Emergence

- Strong demographics
- Rural to urban transition

Each holding is analyzed through multiple lenses

Each company in the portfolio will undergo extensive analysis to ensure that the portfolio reflects the investment team's highest conviction ideas. In addition to fundamental research, each stock in the portfolio is evaluated based on the growth potential of the business/industry it operates in and the strength of the company's management team. This multifaceted approach ensures that each security that is placed on our watch list is viewed through multiple lenses.



Experienced Investment Management

The **Empire Life Global Growth GIF** is managed by David Mann and Ashley Misquitta, who have decades of collective experience with managing global equity investments.



DAVID MANN, CFA
Senior Portfolio Manager

David joined Empire Life Investments Inc. in 2019 as a Portfolio Manager, focusing on global equities.

David was previously employed at an independent Canadian wealth management firm where he held the responsibilities of Portfolio Manager and Director of Equity Research.



ASHLEY MISQUITTA, CFA
Senior Portfolio Manager & Investment Strategist

Ashley joined Empire Life Investments Inc. in 2017 as Senior Portfolio Manager focusing on U.S. and global equities.


Ashley has held progressive roles at various investment management firms, and was co-manager of an award winning¹ fund at a leading Canadian investment firm.

¹The Trimark US Companies Fund won the Morningstar Award for the US Equity category in 2012 and 2014.

They are supported by dedicated global equity growth-focused analysts who work with the Portfolio Managers by screening the investment universe of companies that exhibit strong fundamentals and growth potential.

A focus on collaboration

Empire Life fosters a collaborative culture where all research conducted is shared across the broader investment team. This allows the fund's investment team to leverage the expertise of their peers while also providing a forum to express ideas and respectfully debate research. This culture ensures that each holding in the portfolio is supported by a holistic view and a deep understanding of the company, the industry and the region.

 **Contact your advisor to find out how growth can fit into your portfolio or visit empire.ca/growth to learn more.**

Segregated Fund contracts are issued by The Empire Life Insurance Company ("Empire Life"). A description of the key features of the individual variable insurance contract is contained in the Information Folder for the product being considered. **Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value.** All returns are calculated after taking expenses, management and administration fees into account.

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