



**FOR IMMEDIATE RELEASE**

## **2008 Canadian Investment Awards Winners Announced**

### **Annual awards recognize leaders in the financial services industry**

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**TORONTO, ON December 3, 2008.** The Canadian Investment Awards, Canada's premier awards program, recognizing excellence in the financial services industry, is proud to present this year's winners of the 2008 Canadian Investment Awards. The awards were presented earlier this evening at the 14<sup>th</sup> annual event held at The Fairmont Royal York Hotel in Toronto.

*"Our goal each year is to recognize innovation, leadership and commitment to long term investing in Canada," said Sabine Steinbrecher, founder of the Canadian Investment Awards, "Never before has leadership and long term vision been more important to recognize than in these markets. Leaders are making substantial efforts to continue to serve Canadians and we are proud to showcase those at the forefront. Investors can look for these logos when making their investment decisions – knowing that an unbiased process has been put in place to determine leaders who have performed consistently over many years is unlike any other process in Canada."*

The awards recognize leadership in the investment industry and represent Canada's wide range of investment products, including mutual funds, hedge funds, pooled funds, socially responsible funds, and outstanding individual fund managers. Additional awards recognize career achievement, education, technology, innovation, marketing, and community investment. Awards are determined by a jury of industry experts who determine winners through a rigorous, audited process with long term focus. A complete list of jurors can be found on the Canadian Investment Awards website.

This year the CIA again went green with the awarding of the inaugural Green Company Award for Environmental Leadership and with a comprehensive focus on running a green event and awards process.

**Some of the most anticipated award winners are:**

#### **Morningstar Fund Manager of the Year Award**

***Gerald Coleman of CI Investments Inc.***

This award honours the Canadian mutual fund manager who has produced the best performance over the past year but has also been an extraordinary long term manager. To his credit, Mr. Coleman is the first fund manager in fourteen years to have won this award twice and indicates his extraordinary long term vision.

#### **Person of Influence of the Year Award – Sponsored by Satyam Computer Services Ltd.**

***Winner: Purdy Crawford of Osler, Hoskin & Harcourt LL.P.***

Qualifying candidates were chosen from any area of financial services in Canada including fund management, banking, distribution, media, analysts and suppliers. It is presented to an individual who has proven superior performance and an outstanding contribution to the financial community during the previous 12 months. Mr. Crawford was chosen for his innovative and substantial accomplishments on the ABCP solution.

**Career Achievement Award – Sponsored by Fundata Canada Inc.**

**Winner: Dr. William R. Waters**

Qualifying candidates were chosen for their long-term contributions to the financial services industry. Mr. Waters was chosen specifically for his pioneering contributions to portfolio models.

**Analysts' Choice Favourite Fund Company of the Year Award – Sponsored by CGI Inc.**

**Winner: Dynamic Funds**

The award is given to a company that excels in nine key areas such as performance, management, breadth of core fund category representation, community investment, service to industry, investor and advisor education, volatility/risk, fund governance and communication to unit holders. Dynamic excels in communication with financial advisors and investors a critical element in turbulent markets and has the most number of 5-star funds of any company.

**Advisors' Choice Investment Fund Company of the Year Award – Sponsored by Investment Executive**

**Winner: AGF Funds Inc.**

Winners are chosen by a closed survey where Canadian Advisors cast their vote for their favourite fund company. While voting, they judge based on quality and range of products, performance, MER, service, education, community investment and management.

**Green Company Award for Environmental Leadership – Sponsored by Grand & Toy**

**Winner: Vancity**

This year marked the introduction of a new award, the *Green Company Award for Environmental Leadership*, sponsored by Grand and Toy. This award recognizes environmental leadership by a Canadian financial services organization or supplier organization serving the financial services industry. The inaugural winner, Vancity, was selected for their commitment to environmental leadership activities within financial services.

The fund awards are determined through an impartial and analytical process. Candidates are evaluated by independent juries through a detailed analysis of current achievements and a minimum three-year performance history. Strict attention is paid to quantitative performance as well as various measures of risk and the fund's diversification benefits. The focus is not just quantitative alone; juries also weigh qualitative factors such as management quality, availability and fee structure. The Morningstar team spearheaded the process to research the data and create eligible fund lists for the analysts to review. Analysts from across the industry are then responsible for reviewing multiple perspectives within a sound analytical framework and choosing their top three choices. Results go back to Morningstar to audit results and to determine, through a point system, the finalists and winner in each category.

**The 2008 Canadian Investment Award Winners are:**

**Canadian Dividend & Income Equity Fund**

*Winner: Stone Dividend Growth Class Canada, Stone & Co. Ltd.*

Silver: AGF Canadian Large Cap Dividend, AGF Funds Inc.

Bronze: TD Dividend Growth, TD Mutual Funds

**Canadian Small/Mid Cap Equity Fund (> 50% Canada)**

*Winner: Dynamic Focus + Small Business, Dynamic Funds*

Silver: GGOF Enterprise, Guardian Group of Funds Ltd.

Bronze: Ethical Special Equity / IA Clarington Canadian Small Cap, Ethical Funds Inc. / IA Clarington Investments Inc.

**Canadian Equity Fund (> 50% Canada)**

Winner: *CI Harbour, CI Investments Inc.*

Silver: *Dynamic Value Fund of Canada, Dynamic Funds*

Bronze: *Mawer Canadian Equity, Mawer Investment Management Ltd.*

**Canadian Balanced Fund**

Winner: *CI Harbour Growth & Income, CI Investments Inc.*

Silver: *CI Signature High Income, CI Investments Inc.*

Bronze: *Fidelity Canadian Balanced, Fidelity Investments Canada Ltd.*

**US Small/Mid Cap Equity Fund**

Winner: *TD US Mid-Cap Growth, TD Mutual Funds*

Silver: *CI American Small Companies, CI Investments Inc.*

Bronze: *TD US Small-Cap Equity, TD Mutual Funds*

**Global Fixed Income Fund**

Winner: *Templeton Global Bond, Franklin Templeton Investments Corp.*

Silver: *CI Global Bond, CI Investments Inc.*

Bronze: *AIC Global Bond, AIC Ltd.*

**Global Small/Mid Cap Equity Fund**

Winner: *Chou Associates, Chou Associates Management Inc.*

Silver: *Mackenzie Cundill Recovery, Mackenzie Financial Corporation*

Bronze: *CI Global Small Companies, CI Investments Inc.*

**Global Equity Fund**

Winner: *Mackenzie Ivy Foreign Equity, Mackenzie Financial Corporation*

Silver: *Mutual Discovery, Franklin Templeton Investments Corp.*

Bronze: *Capital International Global Equity, Capital International Asset Management*

**Canadian Fixed Income Fund**

Winner: *Beutel Goodman Income, Beutel Goodman Managed Funds Inc.*

Silver: *PH&N Total Return Bond, Phillips, Hager & North Investment Management Ltd.*

Bronze: *McLean Budden Fixed Income, McLean Budden Ltd.*

**Canadian Income Trust Fund**

Winner: *Fidelity Income Trust, Fidelity Investments Canada Ltd.*

Silver: *Sentry Select Canadian Income, Sentry Select Capital Corp.*

Bronze: *Investors Income Trust, Investors Group Inc.*

**Global Balanced Fund**

Winner: *CI Signature Income & Growth, CI Investments Inc.*

Silver: *Dynamic Value Balanced, Dynamic Funds*

Bronze: *Mawer Canadian Balanced RSP, Mawer Investment Management Ltd.*

**High Yield Fixed Income Fund**

Winner: *PH&N High Yield Bond, Phillips, Hager & North Investment Management Ltd.*

Silver: *RBC Global High Yield Series, RBC Asset Management Inc.*

Bronze: *Investors Canadian High Yield Income, Investors Group Inc.*

**Asian Equity Fund**

Winner: *GGOF Asian Growth & Income, Guardian Group of Funds Ltd.*

Silver: *Fidelity Far East, Fidelity Investments Canada Ltd.*

Bronze: *CI Japanese, CI Investments Inc.*

**International Equity Fund**

Winner: *Mawer World Investment, Mawer Investment Management Ltd.*

Silver: Renaissance International Equity, CIBC Asset Management Inc.  
Bronze: Mackenzie Universal International Stock, Mackenzie Financial Corporation

#### **European Equity Fund**

Winner: *Mackenzie Ivy European, Mackenzie Financial Corporation*  
Silver: GGOF European Equity, Guardian Group of Funds Ltd.  
Bronze: CI European, CI Investments Inc.

#### **US Equity Fund**

Winner: *Mawer US Equity, Mawer Investment Management Ltd.*  
Silver: CI American Value, CI Investments Inc.  
Bronze: Beutel Goodman American Equity, Beutel Goodman Managed Funds Inc.

#### **Science and Technology Equity Fund**

Winner: *GGOF Global Technology, Guardian Group of Funds Ltd.*  
Silver: Mackenzie Universal Emerging Technology, Mackenzie Financial Corporation  
Bronze: Northwest Specialty Innovations, Northwest & Ethical Investment LP

#### **Healthcare Equity Fund**

Winner: *Mackenzie Universal Health Science, Mackenzie Financial Corporation.*  
Silver: Renaissance Global Health Care, CIBC Asset Management Inc.  
Bronze: TD Health Sciences, TD Mutual Funds

#### **Natural Resources Equity Fund**

Winner: *CI Signature Canadian Resource, CI Investments Inc.*  
Silver: Mackenzie Universal World Resource, Mackenzie Financial Corporation.  
Bronze: Trimark Canadian Resources, Invesco Trimark

#### **Socially Responsible Investment Fund – Sponsored by National Post**

Winner: *Meritas Jantzi Social Index Fund, Meritas Mutual Funds*  
Silver: Ethical Canadian Index Fund, Ethical Funds Inc.

#### **Opportunistic Hedge Fund – Sponsored by Canadian Hedge Watch**

Winner: *JC Clark Preservation Trust, JC Clark Ltd.*  
Silver: CI Trident Global Opportunities Fund, CI Investments  
Bronze: Creststreet Energy Hedge Fund LP., Creststreet Asset Management Ltd.

#### **Multi-strategy Hedge Fund / Fund of Hedge Funds – Sponsored by Canadian Hedge Watch**

Winner: *National Life Multi-Strategy Fund, National Life Group*  
Silver: Mackenzie Alternative Strategies Fund, Mackenzie Financial Corporation

#### **Relative Value Hedge Fund – Sponsored by Canadian Hedge Watch**

Winner: *Amethyst Arbitrage Fund, Crystalline Management Inc.*

#### **Canadian Equity Pooled Fund**

Winner: *Highstreet Canadian Equity, Highstreet Asset Management Inc.*  
Silver: Fidelity Canadian Disciplined Equity, Fidelity Investments Canada Ltd.  
Bronze: Fidelity Canadian Large Cap, Fidelity Investments Canada Ltd.

#### **Canadian Income Pooled Fund – Sponsored by Audi Canada**

Winner: *Beutel Goodman Income, Beutel Goodman & Company Ltd.*  
Silver: PH&N Total Return Bond, Phillips, Hager & North Investment Management Ltd.  
Bronze: FGP Bond, Foyston Gordon & Payne Inc.

#### **Canadian Small Cap Pooled Fund**

Winner: *Hillsdale Canadian Performance Equity, Hillsdale Investment Management Inc.*  
Silver: QV Canadian Small Cap, QV Investors Inc.

Bronze: Standard Life Small Cap Equity, Standard Life Assurance Company of Canada

**Global Equity Pooled Fund**

Winner: Beutel Goodman Global Equity, Beutel Goodman & Company Ltd.

Silver: Trimark Fund, Invesco Trimark

Bronze: McLean Budden Global Equity, McLean Budden Ltd.

**Canadian Balanced Pooled Fund**

Winner: Fidelity Canadian Balanced, Fidelity Investments Canada Ltd.

Silver: Beutel Goodman Balanced, Beutel Goodman & Company Ltd.

Bronze: QV Canadian Balanced, QV Investors Inc.

**Global Balanced Pooled Fund – Sponsored by Audi Canada**

Winner: Mawer Canadian Balanced, Mawer Investment Management Ltd.

Silver: Mawer Canadian Diversified Investment, Mawer Investment Management Ltd.

Bronze: McLean Budden Balanced Growth Pension, McLean Budden Ltd.

**US Equity Pooled Fund**

Winner: CI American Value, CI Investments Inc.

Silver: Mawer US Equity, Mawer Investment Management Ltd.

Bronze: Beutel Goodman American Equity, Beutel Goodman & Company Ltd.

**International Equity Pooled Fund**

Winner: Mawer World Investment, Mawer Investment Management Ltd.

Silver: GE Asset Management International Equity, GE Asset Management Canada

Bronze: Legg Mason Brandywine International Equity, Legg Mason Canada Inc.

**Canadian Investment Marketing Award – Sponsored by Broadridge Investor Communications Solutions, Canada**

Winner: Criterion Investments for “What’s Your Entry Point?”

Silver: Scotiabank, for “Second Opinion” Investment Campaign

Bronze: Dynamic Funds for “DynamicEdge Portfolios”

**Analysts' Choice Fund Company of the Year Award – Sponsored by CGI Inc.**

Winner: Dynamic Funds

Silver: CI Investments Inc.

Bronze: Fidelity Investments Canada Ltd.

**Investor Education Award – Sponsored by Investment Fund Institute of Canada**

Winner: Russell Investments Canada Ltd. for “Don’t retire from investing, invest for retirement”

Silver: Mackenzie Financial Corporation for “’til you’re blue in the face”

Bronze: Fidelity Investments Canada Ltd. / Sun Life Financial Inc. for their retirement websites (tie)

**Advisor Education Award – Sponsored by Learning Library Inc.**

Winner: Investment Planning Counsel for “The Total Client Experience”

Silver: Advisor Education Program, Russell Investments Canada Ltd. for “Endowments and Foundations Advisor Education Program”

**Career Achievement Award – Sponsored by Fundata Canada Inc.**

Winner: Dr. William R. Waters

**Person of Influence of the Year Award – Sponsored by Satyam Computer Services Ltd.**

Winner: Purdy Crawford, Osler, Hoskin & Harcourt LLP.

**Best Use of Technology Award – Sponsored by VAULT Solutions Inc.**

Winner: Investment Planning Counsel for “The IPC Advisor Office”

Silver: Russell Investments Canada Ltd. for “The Russell Essentials • Lifestyle • Estate Retirement Tool”

Bronze: PlanPlus for “NBCN – Next Generation IPS Solution”

**Best New Initiative Award – Sponsored by Informco**

*Winner: Fidelity Investments Canada Ltd. for “Fidelity Income Replacement Portfolios™”*

Silver: Manulife Financial for “Income For Life Initiative for Manulife GIF Select featuring IncomePlus”

**Advisors' Choice Investment Fund Company of the Year – Sponsored by Investment Executive**

*Winner: AGF Funds Inc.*

Silver: Dynamic Funds

Bronze: Fidelity Investments Canada Ltd.

**Morningstar Fund Manager of the Year**

*Winner: Gerald Coleman, CI Investments Inc.*

**Corporate Citizenship Award – Sponsored by Imagine Canada**

*Winner: Fidelity Investments Canada Ltd.*

**YMCA Outstanding Investment in Youth Awards**

*Winner: AGF Funds Inc.*

*Winner: Fidelity Investments Canada Ltd.*

**Green Company Award for Environmental Leadership – Sponsored by Grand & Toy**

*Winner: Vancity*

Silver: TD Bank Financial Group

“Each year, the Canadian Investment Awards showcases companies whose innovation and commitment to Canadian investors sets them apart from their peers,” said Steinbrecher. “In times of economic uncertainty, these industry leaders have demonstrated the leadership and long-term vision necessary to excel.”

For more information please visit [www.InvestmentAwards.com](http://www.InvestmentAwards.com). Awards were presented at the 14<sup>th</sup> Annual event held on December 3<sup>rd</sup>, 2008. Winners will be posted online December 4<sup>th</sup> and in the Canadian Investment Guide Magazine at selected newsstands early December.

“In closing, I want to sincerely thank all of our sponsors and look forward to another exciting year of raising the bar in the Canadian Financial Services industry. Please join us next year for the 2009 Canadian Investment Awards to be held on December 2<sup>nd</sup>, 2009. Submissions will open in June 2009.”

**Thank you to all our partners and sponsors:**

**Platinum:** CGI / Morningstar

**Gold:** Canadian Business / MoneySense

**Silver:** Broadridge Investor Communications Solutions, Canada / Canadian Hedge Watch / Fundata Canada Inc. / Grand & Toy / Informco / Investment Executive / Learning Library Inc. / Satyam Computer Services Ltd.

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**About the Canadian Investment Awards**

The Canadian Investment Awards and Event recognize leading investment products and firms illustrating an enduring commitment to excellence within the Canadian financial services industry overall. It is the only time each year in Canada, that the industry, investors and advisors come together to select top performers. The event attracts about 600 guests annually and represents the year long work of over 30

firms, 40 senior analysts and expert jury members researching and ranking 50 categories and is supported by over 30 principal sponsors.

The unusual nature of this collaborative structure provides an unbiased and objective outcome that is completely unique to these awards and to Canada. No other analysis process, nor any other resource, provides this broad industry representation via "collaborative results" and the top performers have become a valuable annual reference guide for Canadian investors and advisors.

For more information about the Canadian Investment Awards, please visit [www.InvestmentAwards.com](http://www.InvestmentAwards.com)

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