

J.P. Morgan Asset Management

A partner with unparalleled global resources
across all asset classes and regions

Why J.P. Morgan in our open architecture?

- › **Investment culture** informed by over a century of investing through every market cycle.
- › **Global perspective** that only a well-connected view can deliver.
- › **Research-driven approach** that builds on innovation in data science.
- › **Stability and expertise** within portfolio management teams.
- › **Demonstrated outcomes** with investment solutions designed to achieve long-term goals.

Mandates and managers

Fixed Income

NBI Unconstrained Fixed Income Fund

Designed to deliver long-term total return and invest opportunistically across different markets and sectors.

Performance | Also available as an ETF (NUBF)

[Learn more](#)



Bob Michele
CFA
Chief Investment Officer



Iain Stealey
CFA
Portfolio Manager

NBI High Yield Bond Fund

Designed to deliver a high level of income from a portfolio of high-yield debt securities.

Performance | Also available as an ETF (NHYB)

[Learn more](#)



Robert L. Cook
CFA
Managing Director



Thomas G. Hauser
CFA
Managing Director

Equity

NBI Innovators Fund

Designed to deliver capital appreciation through investments in companies that drive superior innovation for potentially higher profitability.

Performance

[Learn more](#)



Manish Goyal
M.Com, M.Sc.
Portfolio Manager

J.P.Morgan ASSET MANAGEMENT

us\$ 2.9 trillion

Assets under management

us\$ 835 billion

in equity assets

us\$ 753 billion

in fixed income securities

Source: J.P. Morgan Asset Management Inc.
Data as of December 31, 2023

Investment team

1,290+

Investment professionals

600+

Strategies managed

2,500+

Onsite visits of companies
in the investment universe

Firm highlights

- › Works with more than 90% of Fortune 500 companies and has a relationship with 50% of American household
- › Adapted to 30 U.S. presidents and changing politics worldwide

Leveraging a broad global platform

The extensive team of investment professionals all leverage one centralized research and risk platform to uncover opportunities and risks.



Sound investment approach

Capitalizing on a disciplined investment process and rigorous risk management framework that help empower better decisions.

Solid track record

Focused on delivering consistent risk-adjusted returns in different market cycles and interest rate environments.

A steward of capital

- › A history of trustworthiness for 150 years.
- › A firm-wide culture of risk management.
- › A proven track record of navigating through financial crises.

nbinvestments.ca

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Complete information on the Fundgrade A+® ratings for NBI Funds and ETFs is available in this [Press release](#).

Complete information on the LSEG Lipper Fund Award ratings for NBI Funds is available in this [Press release](#).

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