

# PEMBROKE

GROWING TOGETHER

SINCE 1968

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## PEMBROKE EXPANDS ITS RANGE OF SOLUTIONS WITH THE LAUNCH OF THE CANADIAN ALL CAP POOLED FUND

**Montreal, September 21, 2021.** Pembroke is proud to announce the launch of a new product: the Pembroke Canadian All Cap Pooled Fund. This new product further expands the range of solutions available to Pembroke clients.

“With this fund, Pembroke continues to expand its offering to provide increasingly comprehensive wealth management solutions. This is another step in the ongoing expansion of our advisory services and product range,” said Ian Aitken, CEO of Pembroke.

“The Fund differentiates itself from the S&P/TSX Composite Index, its benchmark, and the competition, by leveraging Pembroke’s sector research platform and our expertise in growth equities over the past 50 years,” notes Nicolas Chevalier, Portfolio Manager and Partner. “The Fund is comprised of high-quality growth companies whose management’s interests are aligned with those of investors, a key element of the Pembroke approach.”

The Pembroke Canadian All Cap Pooled Fund selects 25 to 35 companies with a market capitalization of more than \$3 billion. The Fund is sector agnostic and uses a bottom-up investment approach, unlike most of its competitors. Individual stocks are capped at 7% and sectors at 30%.

“This new fund is an important tool in the personalized approach to wealth management we offer our clients,” says Ian Aitken. “It is another tool for building lasting relationships with our clients, and meeting their long-term needs through our advice and our ability to add value.”

The Canadian All Cap Pooled Fund joins other Pembroke funds, including the International Growth Fund, the Corporate Bond Fund and the Canadian Balanced Fund, three mutual funds with five-star ratings from Morningstar.

The Canadian All Cap Fund is offered as a pooled fund and a segregated fund. It is available to accredited investors only.

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## About

*Founded in 1968, Pembroke serves families, foundations and institutions with investment and wealth management solutions. Pembroke values alignment with investor interests, accountability and, most importantly, integrity. The group is a signatory to the United Nations Principles for Responsible Investment.*

*Pembroke is employee-owned and is comprised of two entities, Pembroke Management and its subsidiary, Pembroke Private Wealth Management.*

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