



FOYSTON, GORDON & PAYNE INC.

INVESTMENT COUNSEL

Tradex Management Inc. Annual Unitholders' Presentation

April 26, 2023





Robert Laughton, BA, Vice President - Client Relationship & Business Development Manager

- Joined FGP in 2016
- Held various roles including:
 - VP US Fixed Income – Manulife
 - Senior Associate Fixed Income – Jarislowsky Fraser
 - Managing Director – Bear Stearns & Co.
 - Associate Partner – Investment Consulting - Aon

- Over 42 years of dedicated, independent asset management
- **Quality and Value** approach to investing
- Deep, experienced, **diverse investment teams** conducting **rigorous, bottom up, fundamental** analysis
- Active approach to **integrating ESG** into our decision-making process

- Portfolio managers are **equity holders in FGP** and **invest** in the funds they manage

- **The FGP Foundation**
 - Funded by FGP shareholders, the Foundation donates annually to charities focused on youth

- We are a **value** investors
- We buy **high quality companies** at **attractive valuations**
- Our approach is bottom up based on internal research
- We have a **long-term view** on investing

What is ESG ?

Environmental

- Greenhouse gas emissions
- Water consumption
- Waste management

Social

- Employee engagement
- Health and safety
- Community engagement
- Diversity

Governance

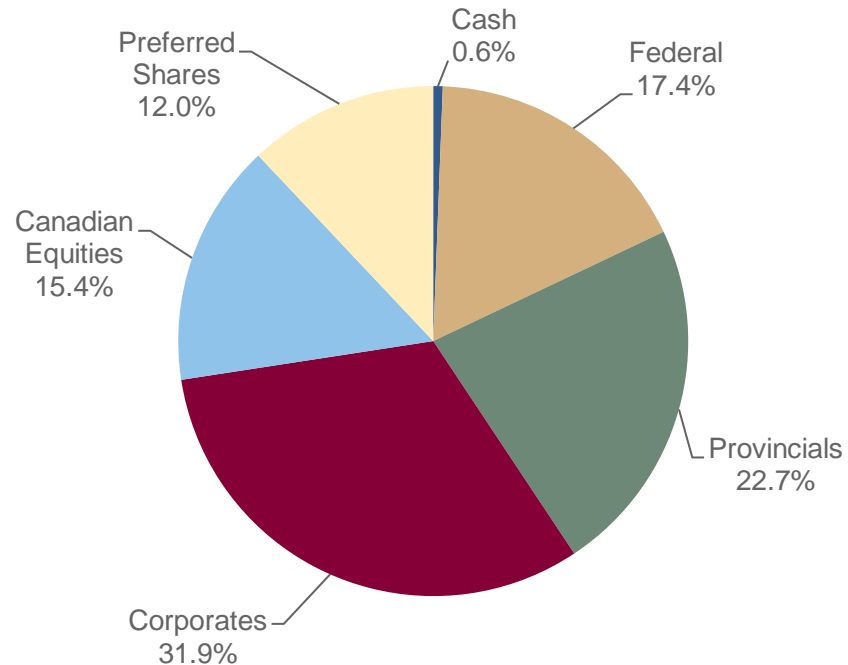
- Board governance
- Executive oversight
- Corporate risk control
- Corporate targets

Three core ESG principles:

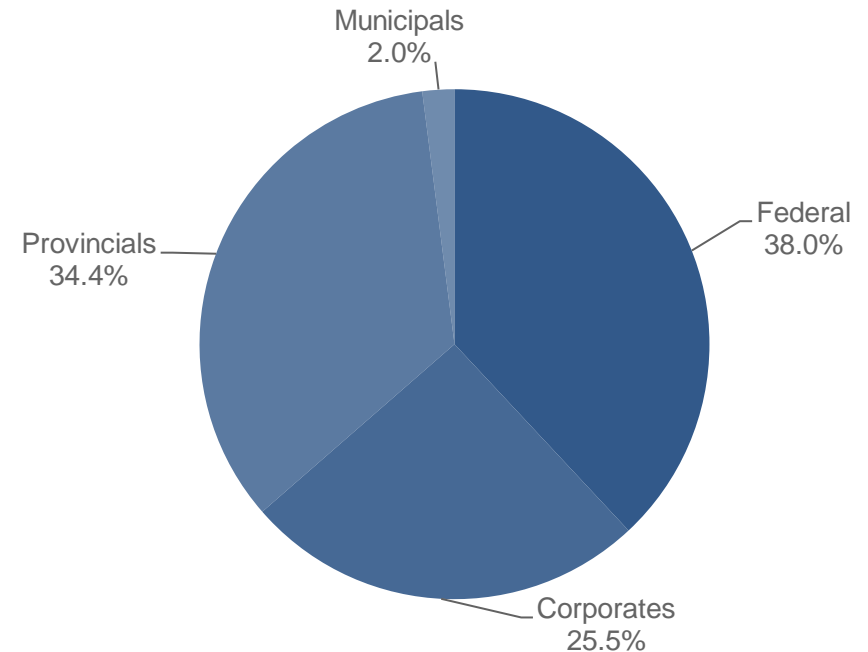
1. Our overall approach is to **engage, monitor, and report**.
2. We use ESG factors to identify **quality** and **risk** for each of our companies.
3. We believe **constructive engagement** is the most important element of our policy based on our long-term ownership.

- Originally 100% fixed income
- Decision made in at the beginning of the FGP mandate in 2011 to include income paying equities up to a max 30%

Tradex Bond Fund



FTSE Canada Universe Bond Index



YIELDS (AS OF MARCH 31, 2023)

Tradex Bond Fund	4.6
FTSE Canada Universe Bond Index	4.0

Source: FTSE Global Debt Capital Markets Total may not add up to 100% due to rounding
See appendix for notes & disclosures



MARKET OVERVIEW

Exogenous shocks are **unexpected** or **unpredictable** events that occur outside an industry or country

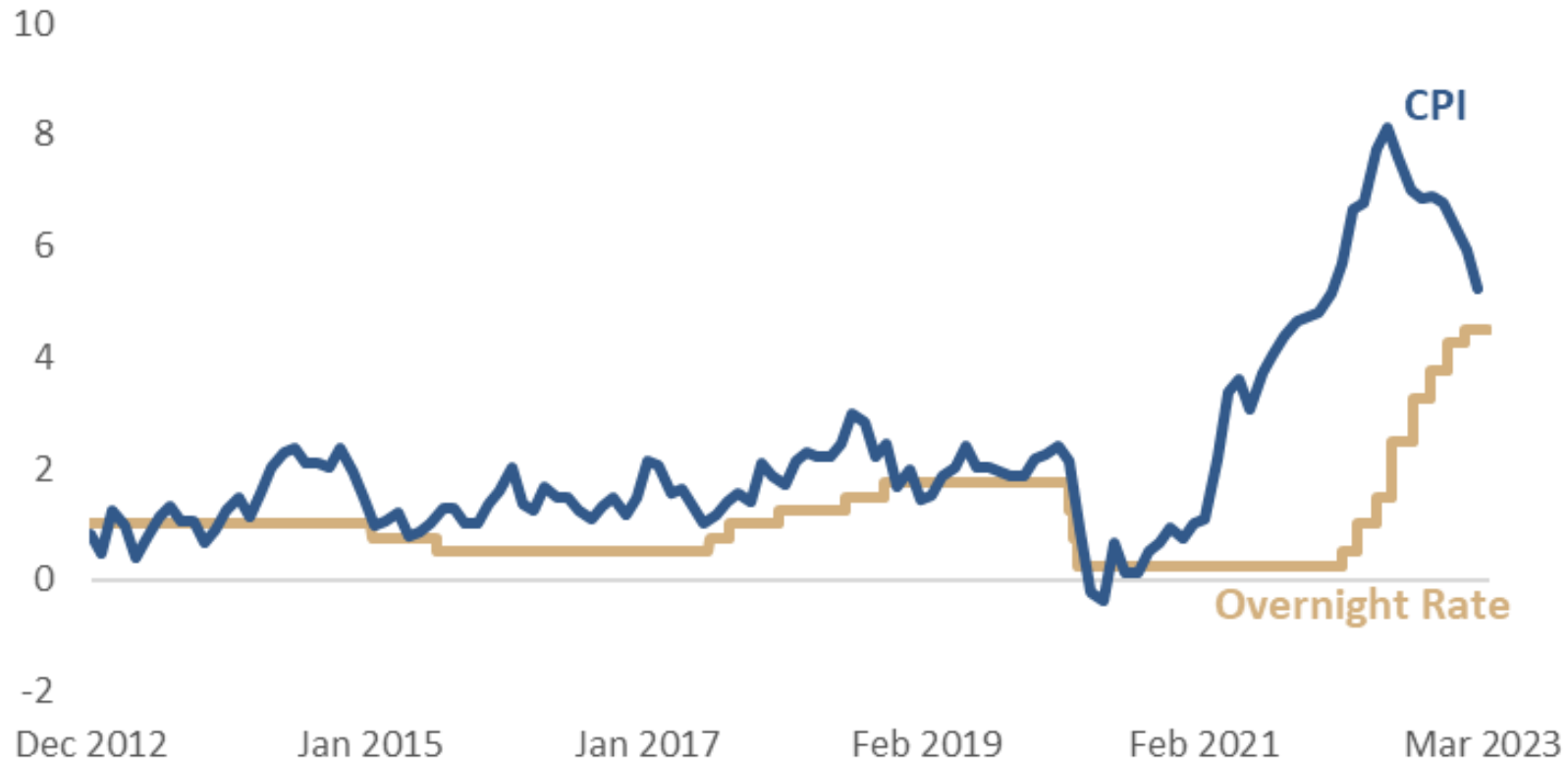
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can have a dramatic effect on the performance or markets within an industry or country.

The World economy has experienced three exogenous shocks in the last two years:

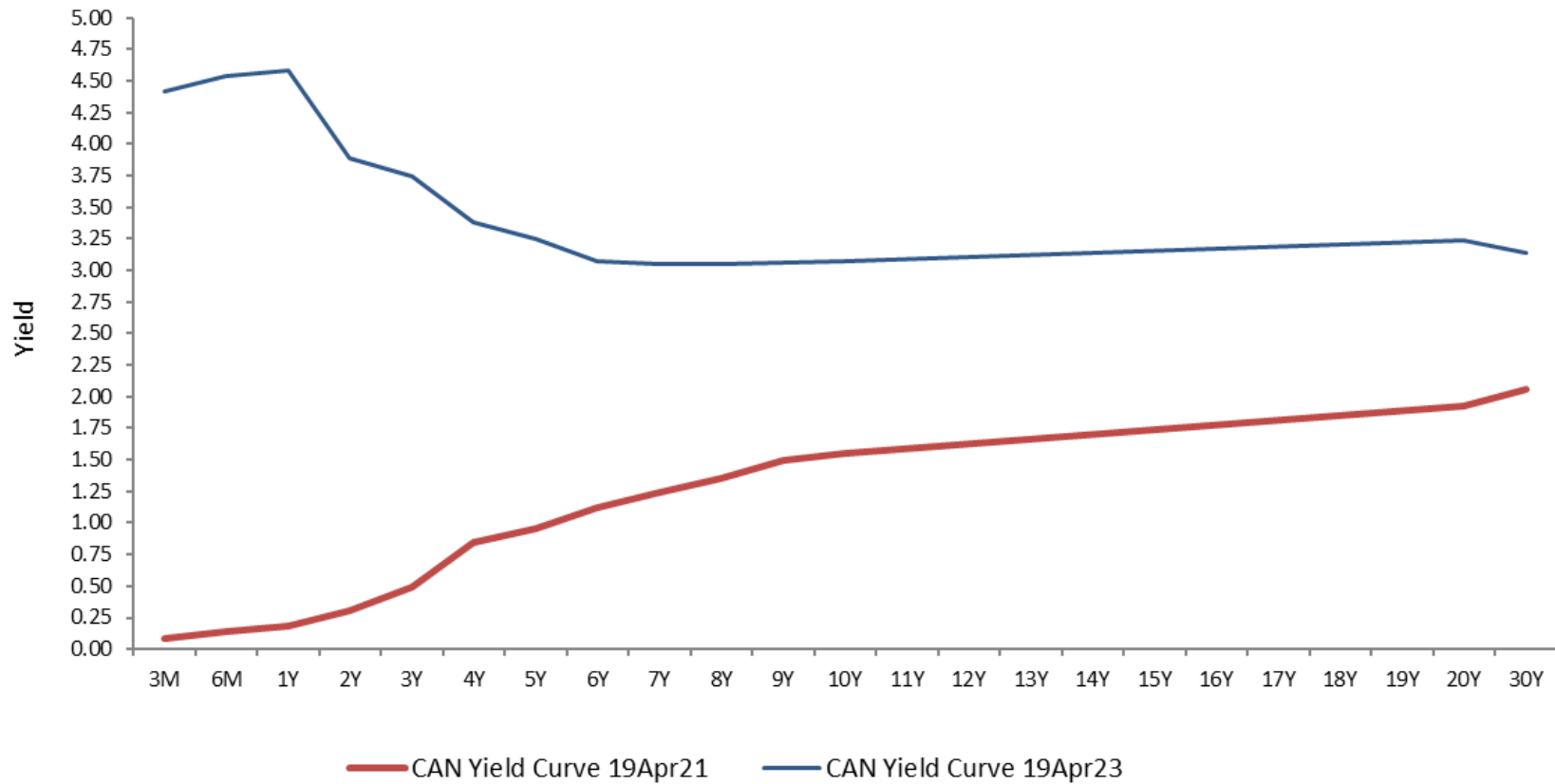
- Covid 19
- High inflation
- War in Europe

Overnight Rate vs CPI

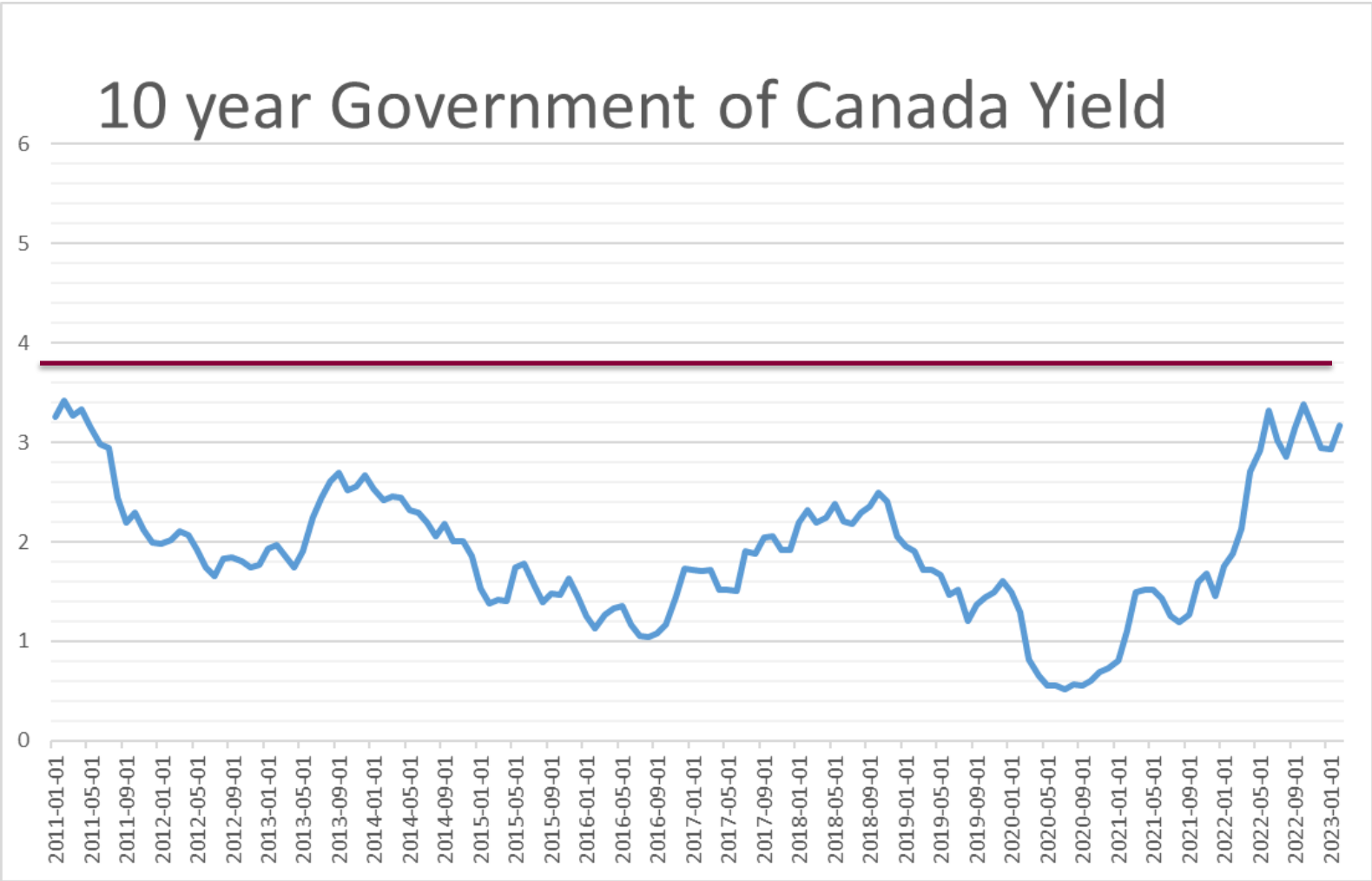


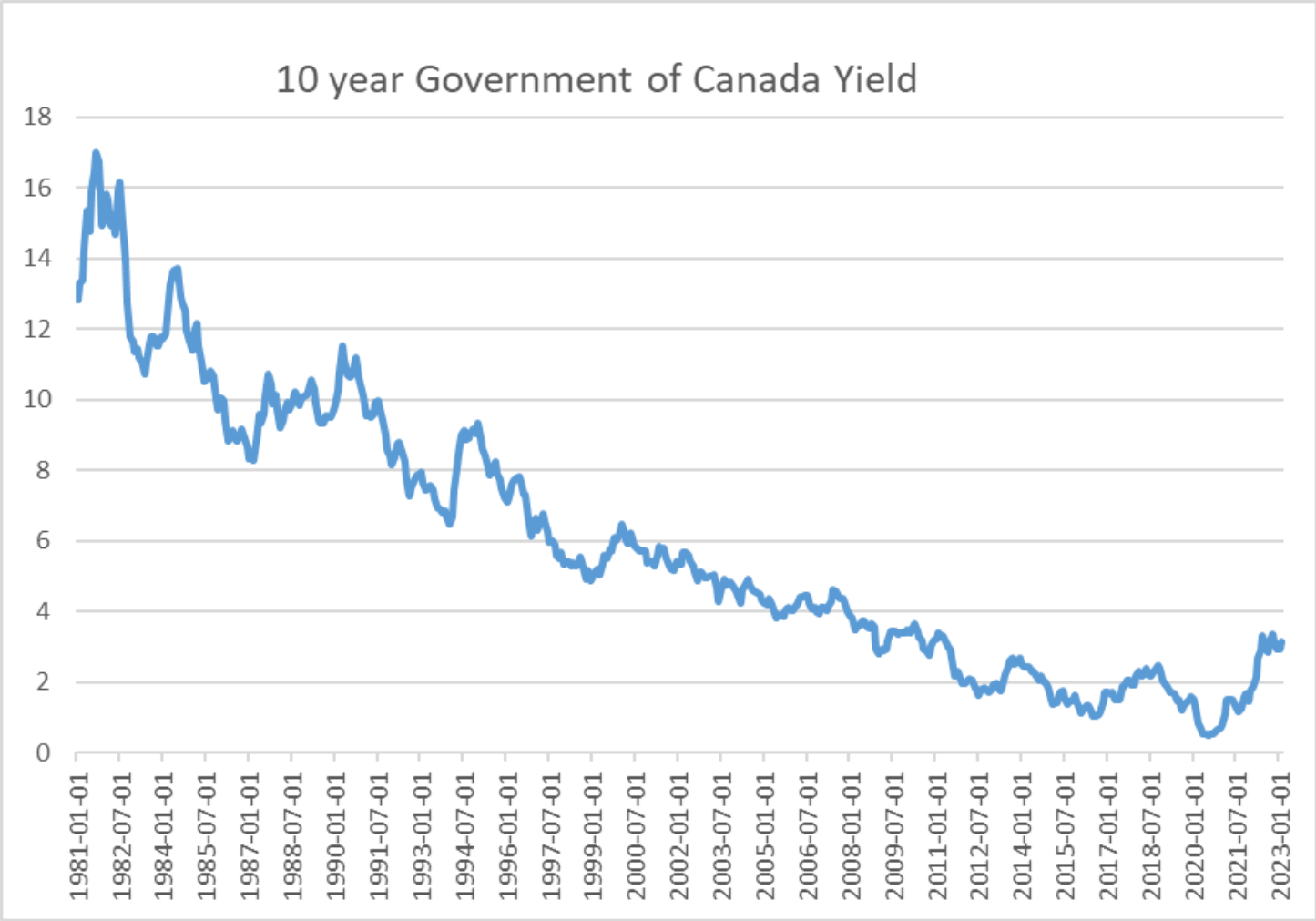
Source: Bloomberg

Canada Yield Curve



Source: Bloomberg





S&P/TSX INDEX



S&P 500 INDEX

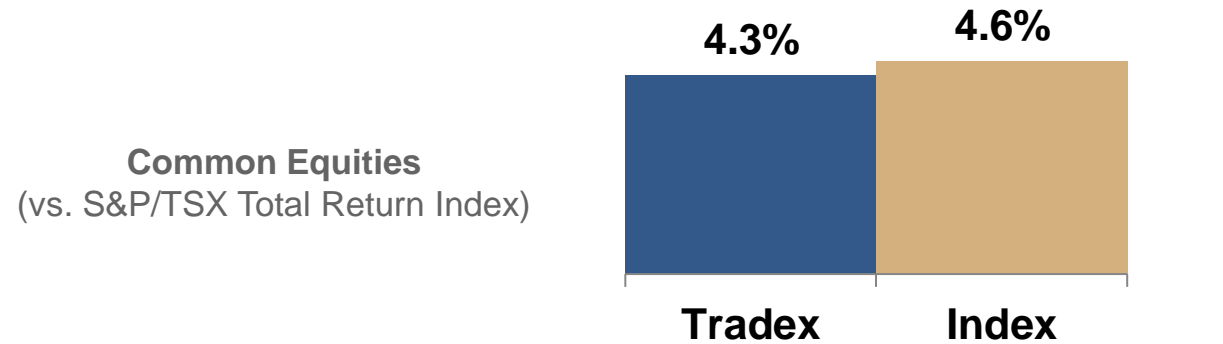
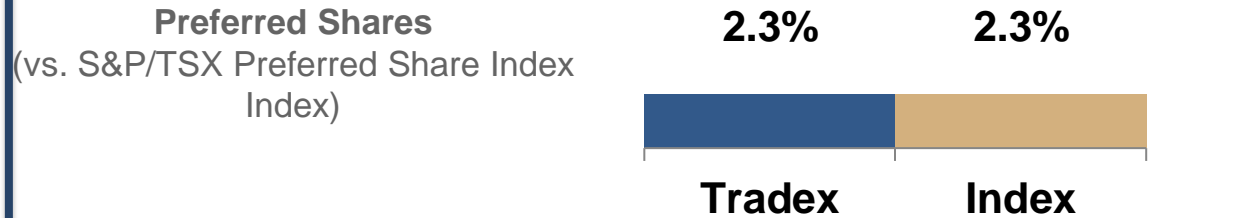
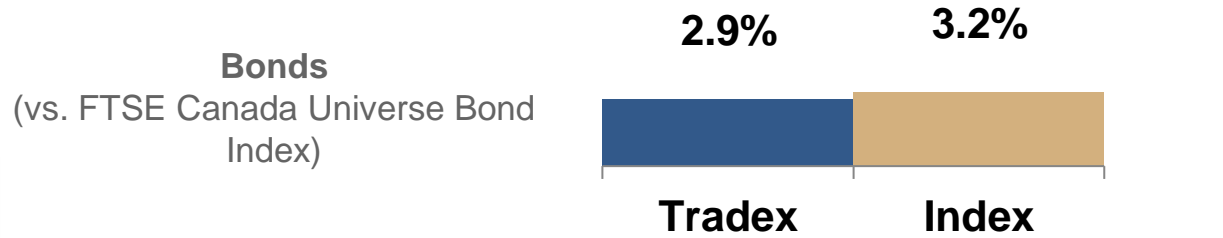
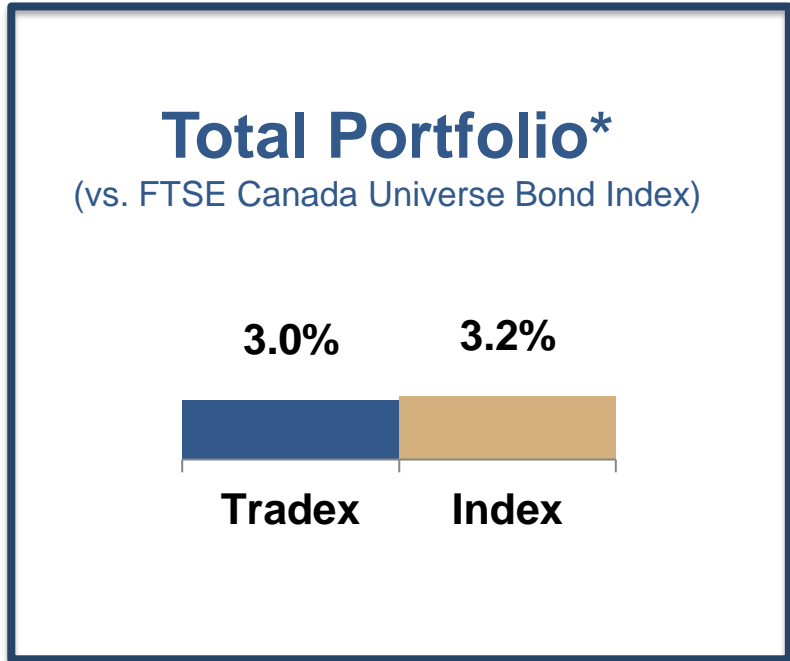


TOP 5 STOCKS – TRADEX PORTFOLIO (2 Years)

SECURITY NAME	RETURN (%)
Imperial Oil Ltd.	125.79
Canadian Natural Resources Ltd.	92.51
Suncor Energy Inc.	59.73
Nutrien Ltd.	47.43
Hydro One Ltd.	31.47

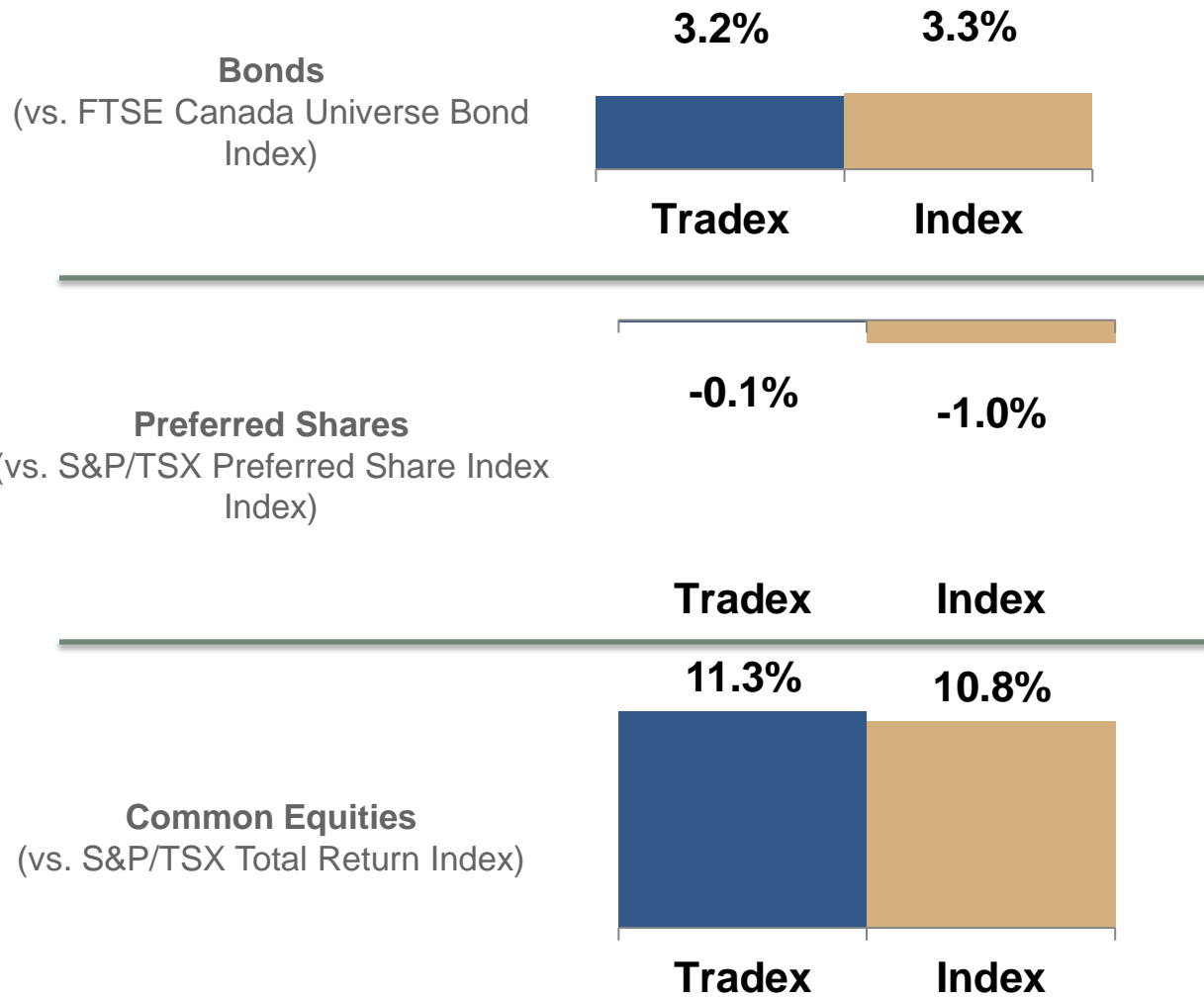
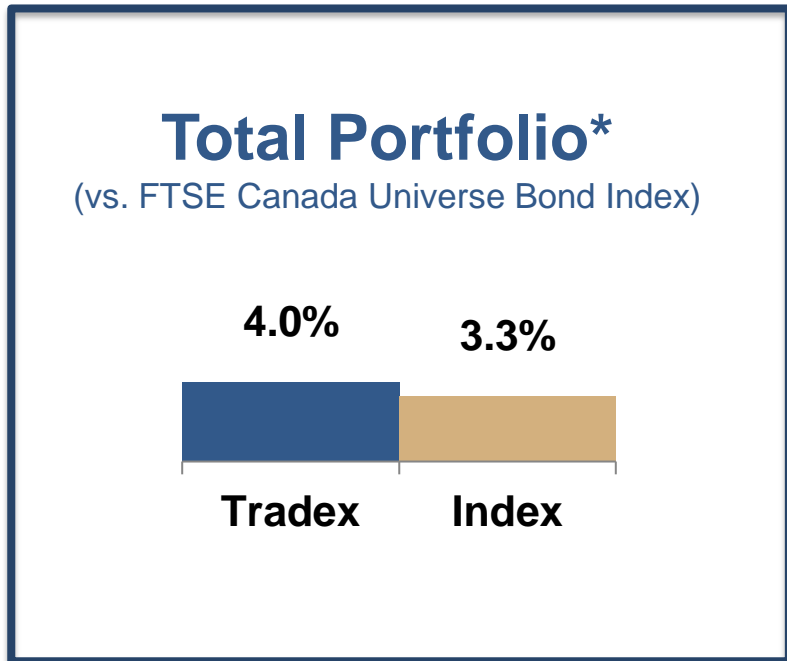


PERFORMANCE



*As of March 31, 2023

*Bonds Inception Date: March 31, 2011
Preferred Shares & Common Equities Inception Date: April 28, 2011
See appendix for notes & disclosures

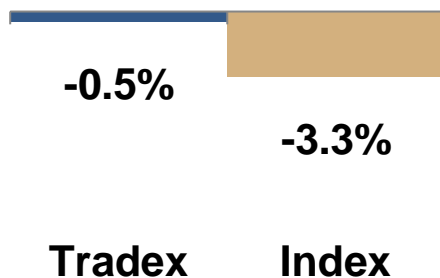


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Total Portfolio

(vs. FTSE Canada Universe Bond Index)



Bonds
(vs. FTSE Canada Universe Bond Index)



-2.7%

-3.3%

Tradex

Index

Preferred Shares

(vs. S&P/TSX Preferred Share Index)



-4.6%

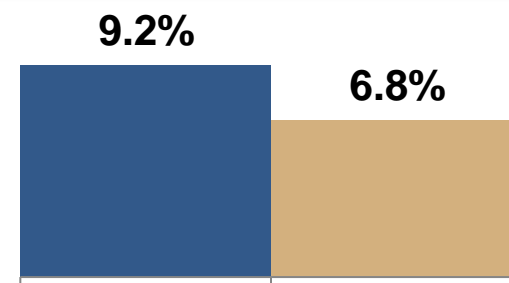
-4.2%

Tradex

Index

Common Equities

(vs. S&P/TSX Total Return Index)



9.2%

6.8%

Tradex

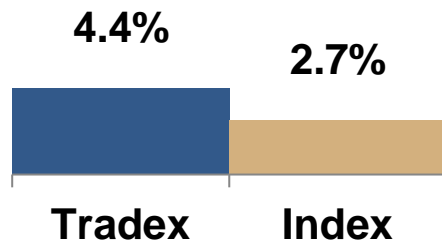
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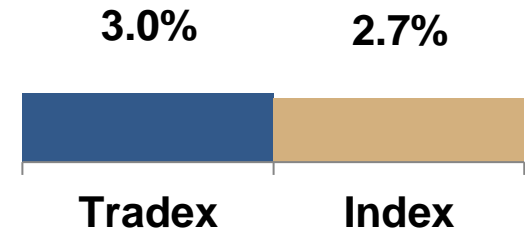
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Total Portfolio*

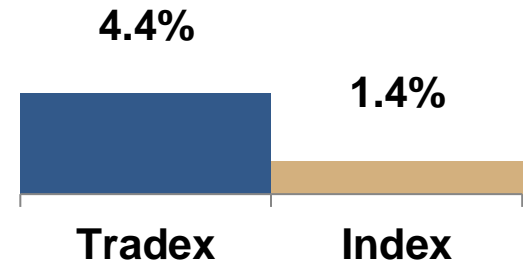
(vs. FTSE Canada Universe Bond Index)



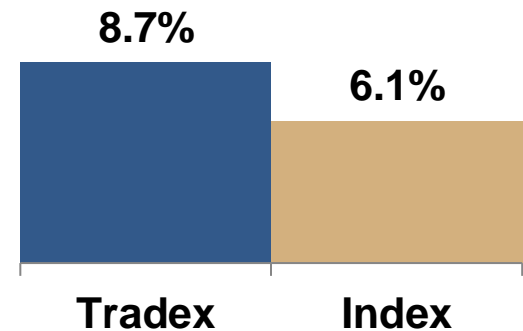
Bonds
(vs. FTSE Canada Universe Bond Index)



Preferred Shares
(vs. S&P/TSX Preferred Share Index)



Common Equities
(vs. S&P/TSX Total Return Index)



*As of March 31, 2023

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? QUESTIONS ?



APPENDIX



BIOGRAPHIES

FGP'S INVESTMENT TEAM – EXPERIENCE, DEPTH AND KNOWLEDGE

NAME	EDUCATION	FUNCTION(S)	FOCUS	YR AT FGP	YR IN INDUSTRY
FGP EQUITY TEAM					
Bryan Pilsworth	CFA, MBA	Portfolio Manager	Canadian Equities (large cap)	2007	2002
John Berry	CFA, MBA, P. Eng.	Portfolio Manager	Canadian Equities (large cap) – no active portfolio management	1998	1998
Stephen Mitchell	CFA	Portfolio Manager	Global Equities	2016	1988
Mohammed Ahmad	CFA, MBA	Portfolio Manager	Global Equities	1999	1999
Tom Duncanson	CFA	Portfolio Manager	Canadian Equities (small cap); Research – Materials	2004	2004
Brandon Tu	CFA, CPA, CA, MAcc	Portfolio Manager	Canadian Equities (income/dividend); Research – Banks, REITs	2008	2001
Andrew Aucoin	CFA	Portfolio Manager	Global Equities	2005	2005
Ray Szutu	CFA	Portfolio Manager	Global Equities	2018	2006
Zubaida Mirza	CFA, MBA	Research	Canadian Equities – Energy, Utilities, Telecom	2008	1996
Frank Meng	CFA, CPA, CA	Research	Canadian Equities – Financials (ex-banks), Industrials, Consumer, Technology	2019	2013
Graeme Lang	BA	Trader	Canadian Equities	2017	2001
Nerojan Varnakumar	CFA	Trader	Global Equities	2021	2014
FGP FIXED INCOME TEAM					
Ryan Domsy	CFA, MEcon, FRM	Portfolio Manager	Fixed Income – Credit & Interest rates	2010	2008
Robert Head	BA	Portfolio Manager	Fixed Income and Asset Allocation	1998	1990
Cameron Greenwood	CFA	Portfolio Manager	Fixed Income – Credit & Interest rates	2007	2007
Andy Thi	CFA	Research	Credit	2016	2012
Jesse Cotton	CFA, MBA	Trader/Research	Credit & Interest rates	2015	2015



***Bryan Pilsworth, CFA, MBA, President & CEO, Portfolio Manager - Canadian Equities
FGP shareholder since 2008***

Bryan joined FGP in 2007 as a senior analyst covering the Telecom and Financial sectors. In 2012, he assumed portfolio management responsibilities for FGP's small cap Canadian equity mandates and held that position until 2017. Following a period of co-management with John Berry, Bryan became the lead portfolio manager of FGP's all-cap Canadian equity mandates in 2018 in addition to his role as President & CEO of the firm. He is also a member of FGP's Board of Directors, Executive Committee, and Investment Committee. He is also a member of FGP's ESG Committee, contributing to the development of the firm's ESG incorporation approach. Bryan graduated from the Richard Ivey School of Business at the University of Western Ontario (MBA) and from Carleton University (BComm). He was on the Dean's Honour List at both universities. Bryan is also a CFA charterholder.



***John Berry, CFA, MBA, P.Eng., Senior Vice President & Portfolio Manager - Canadian Equities
FGP shareholder since 2005***

John's investment career began when he joined FGP in 1998 as the firm's very first equity analyst. Prior to joining FGP, John spent six years as an oil and gas consulting engineer in Calgary and Houston. In 2002, John launched the FGP Small Cap Canadian Equity Fund with just \$5 million in assets and managed this fund for the next 10 years. In 2006, he was promoted to co-manager of FGP's Canadian equity all-cap strategies and became the sole portfolio manager of these strategies in 2008, a position he held for 10 years. Currently, John is a member of the Canadian equity team with a focus on analyzing energy companies and special situations. He also plays a key role in mentoring FGP's research staff and is a member of FGP's Board of Directors and Investment Committee. John is a graduate of the University of Waterloo (MSc in Chemical Engineering) and of the Richard Ivey School of Business at the University of Western Ontario (MBA). He is also a CFA charterholder.



***Tom Duncanson, CFA, Vice President & Portfolio Manager - Canadian Equities
FGP shareholder since 2008***

Tom's career began when he joined FGP in 2004, becoming a Canadian equity research analyst in 2006. In 2016, he became co-manager of FGP's small cap mandates, and in 2017 became portfolio manager of these mandates. Tom also researches the Materials sector for FGP's Canadian equity portfolios. He is a member of FGP's Investment Committee. Tom is a graduate of the University of Western Ontario (Honours BA) and is a CFA charterholder.



***Brandon Tu, CFA, CPA, CA, MAcc, Vice President & Portfolio Manager - Canadian Equities
FGP shareholder since 2011***

Brandon joined FGP in 2008 as a research analyst. In 2016, he became a portfolio manager and now manages FGP's Canadian equity dividend strategies and co-manages the FGP Income Fund. Brandon also researches the Industrials, Consumer Discretionary, Information Technology, Real Estate, and Banking sectors for FGP's Canadian equity portfolios. He is a member of FGP's Investment Committee. Brandon is a professional accountant by training, having begun his career in 2000 as an auditor before taking on a corporate tax advisory position at KPMG. He later moved on to work as an equity research analyst at Genuity Capital Markets. Brandon is a graduate of the University of Waterloo (MAcc). He holds the Chartered Professional Accountant, Chartered Accountant, and U.S. Certified Public Accountant designations. He is also a CFA charterholder.



Zubaida Mirza, CFA, MBA, Vice President, Senior Research Analyst
FGP shareholder since 2010

Zubaida joined FGP in 2008 as a research analyst and was promoted to Vice President in 2023. She covers the Energy, Utilities and Communication Services sectors for FGP's Canadian equity portfolios. Zubaida's career began in 1996 with W. I. Carr Indosuez. She later moved to CIBC World Markets to work as an associate analyst. Zubaida is a graduate of the Institute of Business Administration (MBA) in Pakistan and is a CFA charterholder.



Frank Meng, CFA, CPA, CA, Senior Research Analyst
FGP shareholder since 2022

Frank joined FGP in 2019 as a generalist research analyst on the Canadian equity team and was promoted to Senior Research Analyst in 2023. Frank's career began in 2013 at PWC's asset management practice. He became an equity research associate at Veritas Investment Research in 2016 and at Desjardins Capital Markets in 2017. Frank is a graduate of the University of Toronto (MMPA). He holds the Chartered Professional Accountant, Chartered Accountant designation. He is also a CFA charterholder.



Graeme Lang, BA, Head Canadian Equity Trader
FGP shareholder since 2020

Graeme joined FGP in 2017 as Head Equity Trader. His career started in 2001 at ScotiaMcLeod. He spent 10 years as the director of equity trading at Pollitt & Co. and four years as an institutional equity trader at Haywood Securities. Graeme is a graduate of Dalhousie University (BA). He has been active in Toronto's trading community since 2005. He is currently president of the Institutional Equity Traders Association and governor of the Canadian Security Traders Association.



***Stephen Mitchell, CFA, Senior Vice President & Portfolio Manager
FGP shareholder since 2016***

Stephen joined FGP in 2016. He manages the firm's global equities and co-manages FGP's U.S. equity mandates. He is a member of FGP's Investment Committee. Prior to joining FGP, he spent 23 years at Burgundy Asset Management Ltd., where he managed a range of foreign equity strategies. Between 2008 and 2016, he managed the firm's global and U.S. large cap equity portfolios. Under Stephen's leadership, Burgundy was awarded Institutional Investor magazine's 2016 U.S. Investment Management Award for Global Value Equity. He is a graduate of the University of Western Ontario (Honours BA) and is a CFA charterholder. Stephen has been involved with the Oakville Hospital Foundation since 1994 and was a member of its Board of Directors between 2006 and 2011.



***Mohammed Ahmad, CFA, MBA, Vice President & Portfolio Manager
FGP shareholder since 2008***

Mohammed's career began when he joined FGP in 1999. He joined the investment team in 2003 as a research analyst, helped launch the FGP Emerging Markets Equity strategy in 2009, and took over as lead Portfolio Manager for the strategy in 2015. In 2022, subsequent to the closing of the Emerging Markets Equity strategy, Mohammed became Co-Portfolio Manager of the U.S. Equity strategy. He is a member of FGP's Investment Committee. Mohammed is a graduate of the Institute of Business Administration (MBA) in Pakistan and is a CFA charterholder.



***Andrew Aucoin, CFA, Vice President & Portfolio Manager
FGP shareholder since 2010***

Andrew's career began when he joined FGP in 2005. He became an equity trader in 2006, a research analyst in 2010, and a senior research analyst in 2016. He was promoted to Associate Portfolio Manager in 2019 and became the Co-portfolio manager of FGP's international equity strategies in 2021. He was appointed lead portfolio manager of these strategies in 2023. He is also a member of FGP's Investment Committee. Andrew is a graduate of Bishop's University (BBA) and is a CFA charterholder.



***Ray Szutu, CFA, Portfolio Manager
FGP shareholder since 2020***

Ray joined FGP in 2018 as Research Analyst and was promoted to Senior Research Analyst in 2019. He was appointed the portfolio manager for the FGP Global Smaller Companies Fund at its launch in 2021. He is also a member of FGP's Investment Committee. Ray's career began in 2006 as a mutual fund analyst at Raymond James Ltd. He later moved to AGF Management Ltd. His career as an equity analyst started in 2011 at Sky Investment Counsel and continued at RBC Global Asset Management. Prior to joining FGP, he was an analyst at Invesco Canada covering Canadian and global equities. Ray is a graduate of Simon Fraser University (BBA) and is a CFA charterholder.



Nerojan Varnakumar, CFA, Trader
FGP shareholder since 2022

Nerojan joined FGP in 2021 as our global equity trader and backup Canadian equity trader. Nerojan started his career at CI Investments in 2014 as Financial Services Representative, becoming Portfolio Trading Associate in 2016. Nerojan is a graduate of Ryerson University (Bcomm) and is a CFA charterholder.



**Ryan Domsy, CFA, MEcon, FRM, Executive Vice President & Portfolio Manager, Head of Fixed Income
FGP shareholder since 2012**

Ryan joined FGP in 2010 as a credit analyst. He is now Head of Fixed Income and head of credit research, and was promoted to Executive Vice President in 2020. Ryan is the lead portfolio manager of FGP's core plus, corporate bond, and preferred share mandates. He is also a member of FGP's Investment Committee and the FGP Executive Committee. Ryan's career began in 2008 at DBRS where he was a senior financial analyst covering public finance and infrastructure credits. Ryan is a graduate of Queen's University (MEcon, BComm), holds the Financial Risk Manager designation, and is a CFA charterholder.



**Robert Head, BA, Senior Vice President & Portfolio Manager
FGP shareholder since 2005**

Rob joined FGP in 1998 as a fixed income trader and led the fixed income team from 2005 until 2020. He is the lead portfolio manager for FGP's balanced mandates and the FGP Solutions platform. Rob is also Chair of the Investment Committee and responsible for Asset Allocation firm-wide. Rob's career began in 1990 at The Equitable Life Insurance Company of Canada, first in the actuarial department then as a trader, analyst, and fixed income portfolio manager.



**Cameron Greenwood, CFA, Vice President & Portfolio Manager - Fixed Income
FGP shareholder since 2012**

Cameron's career began when he joined FGP in 2007. He moved to the Fixed Income team as a trader in 2009. He is now a senior analyst focusing on corporate credit, provincial credit and macroeconomic research. He is also a portfolio manager. Cameron is the lead portfolio manager of FGP's short and long duration fixed income mandates, is responsible for interest-rate strategies, and has back-up responsibilities on credit-focused fixed income mandates. Cameron is also a member of FGP's Investment Committee. Cameron is a graduate of Wilfrid Laurier University (BA) and is a CFA charterholder.



**Andy Thi, CFA, Senior Credit Analyst
FGP shareholder since 2017**

Andy joined FGP in 2016 as a credit analyst and was promoted to Senior Credit Analyst in 2019. He is also a member of FGP's ESG Committee, contributing to the development of the firm's ESG incorporation approach. Andy's career began in 2012 at DBRS where he specialized in the analysis of energy companies. Andy is a graduate of the Schulich School of Business at York University (Honours BBA) and is a CFA charterholder.



Jesse Cotton, CFA, MBA, Fixed Income Trader
FGP shareholder since 2020

Jesse joined FGP in 2017 as a fixed income trader. He also has some analyst responsibilities. Jesse was an MBA co-op student on FGP's fixed income team in the fall of 2015 and summer of 2016, after which he worked at FGP part-time while completing his MBA studies. He joined FGP full-time in January 2017. Jesse is a graduate of McMaster University (MBA) and McGill University (BA), and is a CFA charterholder.



***Kimberley Woolverton, CFA, Executive Vice President, Head of Distribution
FGP shareholder since 2019***

Kimberley joined FGP in 2018 to lead the institutional client servicing team and has led our firm-wide sales, marketing and client service activities since 2019. She is also a member of FGP's Investment Committee and the FGP Executive Committee. Kimberley's investment career began in 1994. She held positions at The Guardian Group of Funds, Lincoln Trust Company, and Merrill Lynch before moving into business development and client servicing roles at Burgundy Asset Management and Aberdeen Asset Management. She is a graduate of McGill University (BSc) and is a CFA charterholder. Kimberley has been actively involved with the Association of Investment Management Sales Executives (AIMSE) and currently serves as the President of AIMSE Canada and as a member of the U.S. board of directors.



***Patrick Osler, CFA, Vice President, Head of Wealth Management
FGP shareholder since 2010***

Patrick joined FGP in 2003 as a Private Client Services product manager supporting the firm's Separately Managed Account Wrap business. He became head of FGP's Sub-Advisory business in 2010 and was promoted to Head of Wealth Management in 2019. He is also a member of FGP's Investment Committee and Chair of its Diversity, Equity and Inclusion (DE&I) Committee. Patrick's career started in retail trading in 2000 at TD Waterhouse. He moved to the High Net Worth Advisory group at First Asset Management, where he helped develop the company's Separately Managed Account program. He is a graduate of Bishop's University (BA) and a CFA Charterholder.



***Phil Chen, CFA, MBA, P.Eng., Vice President - Client Portfolio Manager
FGP shareholder since 2022***

Phil joined FGP in 2019 and is responsible for private client portfolio management. Phil came to FGP with 25 years of investment experience spanning private wealth management, investment research, and investment consulting. Prior to joining FGP, Phil was a vice president at Bell Kearns & Associates, where he worked closely with private clients since 2013. Phil started his investment career in 1994 at Sun Life of Canada as an investment analyst. He also worked for SEI Investments, Russell Investments, and Mercer Global Investments. Phil is a graduate of the University of British Columbia (Master of Engineering) and of the University of Toronto (MBA). He is also a CFA charterholder.



***Mark Klinkow, CFA, MBA, Vice President - Client Portfolio Manager
FGP shareholder since 2008***

Mark joined FGP in 2006 and is responsible for private client portfolio management. Mark has served private clients in the financial services and investment industries since 1986. Prior to joining the firm, Mark ran his own investment counseling business and then worked as a private client portfolio manager for an investment counseling firm. Mark is a graduate of McMaster University (MBA) and the University of British Columbia (BComm). He is also a CFA charterholder.



Robert Laughton, BA, Vice President - Client Relationship & Business Development Manager

Based in the Montreal region, Robert joined FGP in 2016 and is responsible for institutional client servicing and business development. He is also a member of FGP's ESG Committee, contributing to the development of the firm's ESG incorporation approach. Robert's career began in 1981 when he joined Royal Trust as an analyst in their Treasury department. His experience since then has included the roles of Vice President, U.S. Fixed Income at Manulife Financial; Managing Director at Bear Stearns & Co.; and Senior Associate at Jarislowsky, Fraser Ltd. He was most recently Associate Partner - Investment Consulting at Aon Hewitt. Robert is a graduate of the University of Toronto (Honours BA).



**Gabriel Lopezpineda, BA, Vice President - Client Relationship & Business Development Manager
FGP shareholder since 2020**

Gabriel joined FGP in 2018 and is responsible for institutional client servicing and business development. He is also a member of FGP's ESG Committee, contributing to the development of the firm's ESG incorporation approach. Gabriel's career began in 2002 at Manulife Financial's U.S. Group Pensions division. He later moved to Manulife Asset Management where he was responsible for the client service team. In 2014, he joined Sun Life Institutional Investments as Assistant Vice President and Head of Client Services. Gabriel has worked with a broad spectrum of institutional clients and consultants across Canada to understand and meet their needs. He is a graduate of the University of Toronto (BA in Economics). Gabriel is actively involved with the Canadian Mental Health Association (CMHA), and serves in the Fundraising and Marketing committees for the York region branch in Ontario.



**Laura Sebesta, CFA, Principal - Client Relationship & Business Development Manager
FGP shareholder since 2012**

Laura's career began when she joined FGP in 2005. She moved to the trading room in 2009 and led the equity trading team from 2011 to 2017. She is now responsible for business development and relationship management with FGP's sub-advisory client partners. Laura is a graduate of the University of Toronto (HBA) and is a CFA charterholder. She has been an active member of Toronto's investment community, having sat on the boards of the Canadian Security Traders Association (2014 to 2016) and the Institutional Equity Traders Association (2012 to 2014). Laura is now part of a group helping promote workplace diversity in Canada through an initiative known as theBoardlist, a curated talent marketplace that connects highly qualified female candidates with opportunities to serve on the boards of directors of private and public companies.



Albert Cama, MBA, Principal - National Sales

Albert joined FGP in 2022 as Principal - National Sales to drive business development activities within our sub-advisory client channel. Albert's career began in 2011 at RBC Dominion Securities, where he worked in business development. His experience since then included advisor roles at iA Private Wealth and Scotiabank, and a business development role at AGF Investments. Prior to joining FGP, he was Regional Sales Director at Desjardins Global Asset Management. Albert is a graduate of Queen's University (MBA).



***William Cunningham, CPA, CMA, Vice President - Operations & Finance
FGP shareholder since 2013***

Will joined FGP's Operations team in 2008 and is currently responsible for FGP's Operations and Finance teams. He was promoted to Vice President in 2019. Prior to his current role, Will managed the Compliance and Operations departments. His previous work experience includes account management at the Royal Bank of Canada. Will is a graduate of St. Francis Xavier University (BBA). He is a Chartered Professional Accountant, Certified Management Accountant.



Susan Eapen, JD, Chief of Compliance

Susan joined FGP in 2020 as Chief Compliance Officer. She leads our firm's Compliance team and acts as our in-house legal counsel. She is a member of FGP's Investment Committee. Susan's career in compliance started in 2003 at the Bank of Nova Scotia's Global Banking and Capital Markets division, where she worked for 14 years. She moved to RBC Capital Markets, where she was Director, Canadian Control Room, then to TD Securities, where she was AVP, Head Global Control Room. Prior to working in compliance, Susan was a lawyer with a Toronto law firm and, later, with a law firm in San Francisco. Susan is a graduate of the University of British Columbia (JD). She was called to the Ontario Bar in 1996 and is a member of the Law Society of Ontario.



Erica Myers, Senior Compliance Officer

Erica joined FGP in 2022 and manages FGP's day-to-day compliance function. Erica's career in the investment industry started in 2018 as Administrator - Wealth Solutions at Skyline Wealth Management, where she later became Compliance Analyst and then Compliance Officer. Erica passed the Chief Compliance Officer Qualifying Exam through the Canadian Securities Institute in 2021.



Mary Bradbury, BA, Manager - Finance

Mary joined FGP in 2008 and is currently responsible for managing the day-to-day finance function at FGP. Prior to her current role, Mary worked in various capacities for FGP's Finance and Operations departments. Mary is a graduate of the University of Toronto (Honours BA) and is currently studying to become a Chartered Professional Accountant.



Charles McCracken, CNE, MCP, MCSE, Manager - Information Technology

Charles joined FGP in 2009 as our Manager of Information Technology. Charles has worked in the IT field since 1989 at companies as diverse as Entre Computer Centre, Gentra, and Brookfield Properties. Prior to joining FGP, he worked as the Manager of IT for AMG Canada, supporting the main office as well as several Canadian subsidiaries. He is a Certified NetWare Engineer, a Microsoft Certified Professional, and a Microsoft Certified System Engineer.



Marina Mascarenhas, BA, Manager - Client Services
FGP shareholder since 2020

Marina joined FGP in 2014 in a role providing support for FGP's institutional and sub-advisory client services. In 2018, she was promoted to manager of the team responsible for institutional client service and in 2019 took on management of client service across the firm. Prior to joining the firm, she worked for more than 12 years with Phillips, Hager & North Investment Management in various capacities and most recently as an Institutional Portfolio Manager Assistant, servicing institutional clients. In addition, Marina worked in developing and servicing high net worth clients at Mackenzie Financial Corporation, and she worked in the trading department at National Bank of Kuwait. Marina is a graduate of the University of Bombay (BA) in India.



Bren Tan, BSc, Client Service Manager

Bren joined FGP in 2014 and provides support to FGP's Client Services team. Prior to joining the firm, he worked as an investor relations associate at Cavalcanti Hume Funfer Inc. Bren is a graduate of the University of Toronto (BSc).



Anureen Bhatti, MBA, Client Service Manager

Anureen joined FGP in 2022 and provides support to FGP's Client Services team. Anureen's investment career began in 2015 as a Finance Associate - Portfolio Management at Oxane Partners in New Delhi. Prior to joining FGP, she was a Portfolio Associate at Yorkville Asset Management. Anureen is a graduate of the Institute of Management Technology (MBA) in India.



Shar Sivakumar, BComm, Client Service Manager

Shar joined FGP in 2022 and provides support to FGP's Client Services team. Shar's career began in 2014 at CIBC where he was a Business Support Officer. He then moved to TD Waterhouse, where he was a Client Transfers Officer. Prior to joining FGP, he was an Operations Administrator at Educators Financial Group. Shar is a graduate of Toronto Metropolitan University (BComm).