

From strength to scale: Advancing investment excellence at CIBC Global Asset Management

CIBC Global Asset Management (CIBC GAM) is charting a bold course forward: delivering a globally connected investment experience that meets clients where they are and anticipates where they're going. This momentum builds on a strategic transformation over the past year, led by **Eric Belanger, Executive Vice-President and Head of CIBC GAM**, which unified region-centric operations into a more aligned investment platform, linking teams across Canada, the US and key international markets.



One connected investment platform

The most significant advance is creating a unified investment architecture. CIBC GAM brought its Canadian and US investment operations together under one globally influenced architecture, strengthening the way research, risk oversight and portfolio construction flow through the firm. Information now moves across borders with greater precision and decision-making is optimized in an open-source framework that helps clients tap into the full breadth of CIBC's capabilities. Faster information flows enable the firm to move from ideation to implementation with agility, drawing on local insights and respecting regional preferences to deliver solutions that resonate where they matter most.

This evolution builds on CIBC GAM's deep, over 50-year roots beginning in Montreal, a foundation that continues to shape its commitment to Canadian investors while deepening its long-standing service to global markets.

In fast-moving markets where local signals are shaped by global dynamics, that connectivity provides sharper insight, faster decisions and a decisive edge when identifying opportunities, providing tailored solutions and managing risk for clients.

“Client centricity is the filter every decision passes through. It guides how we build teams and how we show up for clients.”

— **Eric Belanger**, Executive Vice-President and Head of CIBC Global Asset Management

Long-term partnership as an operating model

CIBC GAM's transformation is as cultural as it is structural. At the heart of the firm's transformation is a culture of shared purpose, connecting people around client ambition rather than products or geography. The global asset manager has reframed partnership to mean sitting on the same side of the table, helping institutions and advisors navigate complexity with transparency and agility.

“Meeting clients where they are manifests in multiple ways,” says Mr. Belanger. “With client centricity as our North Star, we strive to win and deliver on our clients' ambitions through investment excellence, clearer governance, faster insight sharing and modern digital engagement models.”

For advisors, that means a partnership designed to simplify their business: reducing friction, supporting workflows and helping deliver value to clients with confidence. Institutional investors gain a disciplined, fiduciary-driven platform with global reach, ensuring tailored strategies that align with their mandates and long-term objectives. Mr. Belanger underscores that trust is CIBC GAM's defining currency. Acting as a fiduciary for every investor, the firm builds relationships designed to endure: multi-year, value-driven partnerships rooted in clarity, discipline and a shared commitment to client success.

Redefining the investment landscape

Innovation at CIBC GAM is rooted in shared dialogue. The firm is expanding a globally resilient investment platform through collaboration with clients and constituents, co-creating investment solutions that reflect real needs and deliver meaningful outcomes. The firm is activating its strategy around ETFs and alternative investments to reflect evolving demand and is scaling the number of commercially viable investment capabilities. This approach ensures more clients have sophisticated ways to solve their problems with a growing range of solutions that best align with their risk profiles and market perspectives. Across the investor spectrum, clients are gaining access to advanced solutions once reserved for institutions and can be confident they have the tools to compete and thrive in a complex market.

As part of structural changes introduced last year to strengthen collaboration and investment excellence, CIBC GAM appointed **David Wong** as **Group Chief Investment Officer**. Mr. Wong emphasizes that the firm's scale and global connectivity are more than structural; they enable sharper decisions and deeper alignment with client needs.

“Our job is to ensure clients have the full toolkit, including active and passive strategies, alternatives, ETFs and systematic approaches, so they can thrive in all investment environments, including today's concentrated markets,” says Mr. Wong. “That means continuous improvement, cross-border collaboration, independent risk management and building capabilities like private credit, derivatives and quantitative research that anticipate what clients will need next.”

“Innovation isn't optional; it's essential. From private credit to derivatives to systematic strategies, we're building capabilities that anticipate what clients will need next.”

— **David Wong**, Group Chief Investment Officer, CIBC Global Asset Management

Driving the next chapter of investment innovation

The strategic transformation spearheaded by the CIBC GAM team is laying the foundation for everything that comes next.

What should clients expect? Continued modernization of how they engage with the firm, stronger connections across investment teams and disciplined execution that translates global insights into local decisions and solutions. The past year was about building the platform and culture for change, and the next will be about ensuring that transformation shows up where it counts most: inside portfolios and client outcomes.

In evolving markets, CIBC GAM is stepping forward with a renewed identity anchored in connected leadership, client-centric design and global reach. It's a modern platform built to scale for the long term. The transformation is real, and for clients, the next chapter starts now.

Follow CIBC GAM's evolution: cibc.com/gam

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