

PLAN SPONSOR PROFILE FOR AIMSE 2024

NAME OF PLAN: The University of Alberta (endowment)

REPRESENTATIVE CONTACT INFORMATION

Richard Iwuc (richard.iwuc@ualberta.ca)

Meeting Requests: (investmentmeeting@ualberta.ca)

PLAN OVERVIEW

- ASSET SIZE: \$2.3 billion (CAD)
- CONSULTANT: Albourne (private markets), K2 (hedge funds), Mercer (general consultant and performance measurement)
- BOARD MAKEUP: Members of the Board Investment Committee can be found at <https://docs.google.com/document/d/1NdcY050LBI5AWkNvlgG3R5UornnPCcc3RUCIvDCdZyw/edit>

WHAT'S DIFFERENT ABOUT OUR PLAN

We think 50 years ahead when we model our asset allocation and spending. The University endowment is broadly diversified and aims to maintain real purchasing power over the long term ("intergenerational equity"). We break down our portfolio into four strategic categories: growth, inflation sensitive, deflation hedge, and diversifiers.

NAVIGATING INSIDE OUR PLAN – WHO IS THE BEST PERSON TO CONTACT

Richard Iwuc for private markets (private equity [buyout], venture capital, real estate, infrastructure, mining, energy, agriculture, and other real assets). Chad Yaskiw for public markets (equities, bonds, commodities, and hedge funds).

WHAT'S HOT/WHAT'S NOT (Investment Strategies/Industry Trends/Other)

We try to stay away from industry trends and focus on the long term. At the moment we are only looking at venture capital, Asian private equity, agriculture, and esoteric strategies. We are presently not looking to make changes on the public equity, bond, or hedge fund side at this time. The university plans to conduct an asset allocation study later this year.