

Manager profile - Brookfield Investment Management Inc. CIBC Private Pools

About Brookfield:

Brookfield Investment Management Inc. (Brookfield) is an SEC-registered investment advisor providing public securities real assets strategies including global-listed real estate and infrastructure equities, as well as corporate credit and securitized credit. Brookfield is a wholly owned subsidiary of Brookfield Asset Management.



Investment philosophy

- Invests in listed real estate equity, listed infrastructure equity and real asset debt for the long term, with tactical allocations driven by top-down and bottom-up perspectives
- All-in-one exposure to real asset securities provides an optimal mix of risk and return characteristics
- Tactical flexibility across real assets allows for additional active return
- Brookfield's deep and experienced specialist teams identify relative value across the real assets universe, providing bottom-up fundamental active returns.

Investment process overview

Step 1: Top-down macro-economic analysis

The Chief Investment Officer develops a strategic macroeconomic view based on four key factors:

- Interest rate outlook
- Regional economic projections
- Inflation expectations
- Central bank, regulatory, and policy expectations

Step 2: Bottom-up sector analysis

An investment committee comprising teams from real estate equity, infrastructure equity and real asset debt, supplements the macro analysis with sector-specific insights. They evaluate:

- Valuation
- Fundamentals
- Risk
- Trends

Step 3: Portfolio positioning

The combined insights from the top-down and bottom-up analyses inform the final portfolio positioning, aligning investments with both macroeconomic outlooks and sector-level opportunities.

CIBC Real Assets Private Pool

Canadian Purchase Option

- Premium Class: ATL3634
- Class N-Premium: ATL3640
- Class F-Premium: ATL3646

U.S. Purchase Option

- Premium Class: ATL3655
- Class N-Premium: ATL3658
- Class F-Premium: ATL3661

Hedged Purchase Option (Class H)

- Class H-Premium: ATL3637
- Class NH-Premium: ATL3643
- Class FH-Premium: ATL3649

Leveraging its parent company, Brookfield Asset Management, Brookfield benefits from 100 years of history owning and operating real estate and infrastructure assets.

- **Property: \$149 Billion**
 - Large, global property investors
 - Approximately 350 million square feet of office, retail, industrial, multi-family and hotel investments
- **Infrastructure and renewable power: \$54 billion**
 - 100-year history of infrastructure investment, ownership and finance
 - Ports, rail, pipelines, transmission lines and renewable assets located across the globe
 - Large private owner of hydro generation assets

Portfolio Managers – CIBC Real Assets Private Pool

Craig Noble, CFA
CEO, Chief Investment Officer

Craig Noble is CEO and CIO of Brookfield Investment Management, as well as Portfolio Manager for the firm's global infrastructure securities strategies. Mr. Noble oversees all aspects of portfolio management related to the firm's public securities investment strategies. Mr. Noble has 18 years of investment experience that includes launching the firm's listed infrastructure platform and direct investing in infrastructure assets.

Larry Antonatos
Managing Director, Portfolio Manager

Larry Antonatos is a Managing Director, Portfolio Manager for Brookfield Investment Management's diversified real assets strategies, responsible for asset allocation decisions.

Mr. Antonatos has 25 years of investment experience including portfolio management of a U.S. REIT strategy and direct investing in property and mortgage loans.

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