AGF Management Limited

Corporate Overview

AGF's History

AGF was founded in 1957 by **Warren Goldring** and **Allan Manford**.

AGF began as a single innovative idea: to pool the funds of Canadian investors to provide greater access to the U.S. Market.

AGF takes it name from the initials of the **American Growth Fund**, our flagship fund.

About

Founded in 1957, AGF Management Limited (AGF) is an independent and globally diverse asset management firm. Our companies deliver excellence in investing in the public and private markets through three distinct business lines: **AGF Investments, AGF Capital Partners** and **AGF Private Wealth**.

Our Mission: Bringing stability to the world of investing since 1957.

AGF brings a disciplined approach, focused on incorporating sound, responsible and sustainable corporate practices. The firm's collective investment expertise, driven by its fundamental, quantitative and private investing capabilities, extends globally to a wide range of clients, from financial advisors and their clients to high-net worth and institutional investors including pension plans, corporate plans, sovereign wealth funds, endowments and foundations.

Headquartered in Toronto, Canada, AGF has investment operations and client servicing teams on the ground in North America and Europe. AGF serves more than 820,000 investors*. AGF trades on the Toronto Stock Exchange under the symbol AGF.B.

820,000+

AGF serves more than 820,000 investors*

AGF.B

on the Toronto Stock Exchange

*As of March 31, 2026. Investors include clients of the AGF Investments business line only.

More than Six Decades of Leadership and Innovation

1950s Crossing borders

1957
AGF began as a single innovative idea: to pool the funds of Canadian investors to provide greater access to the U.S. market

AGF's co-founders, Warren Goldring and Allan Manford

1960s Unprecedented growth

1962
AGF launches RRSP-eligible funds

AGF launched Canadian Trusteed Income Fund[1]

AGF launched Growth Equity Fund[2]

1970s Challenging times

1976
AGF launches AGF Money Market Fund, an industry first

1980s Post-stagflation boom

1987
AGF reaches over $2 billion in AUM and sets a record high for sales

1990s Eventually everyone retires

1997
Blake Goldring, now Executive Chairman, named President of AGF Management Limited

Judy Goldring joins AGF

2000s A diversified, international investment firm

2005
AGF launches Elements – a new fund-of-fund product that attracted more than $1 billion (C$) in assets in its first year

2010-2017 Embracing change

2014
Kevin McCreadie joins AGF as Chief Investment Officer

AGF expands its alternatives platform with Instar Group Inc. and SAF Group

2017
AGF unveils new brand identity and mission

AGF Launches Quantitative Investing Platform

2018-2020 Leadership Renewal

2018
Kevin McCreadie named Chief Executive Officer and Judy Goldring named President and Head of Global Distribution of AGF Management Limited

2020-2024 Diversifying Capabilities

2021
AGF Management Limited Welcomes Ash Lawrence as Senior Vice-President & Head of Alternatives

2024
AGF Management Limited makes strategic investments in Kensington Capital Partners Limited and New Holland Capital, supporting the growth of its alternatives business, AGF Capital Partners

[1] Renamed AGF Canadian Bond Fund, which merged into AGF Fixed Income Plus Fund on May 20, 2016.
[2] Now called AGF Canadian Growth Equity Class.

Our People

At AGF, the most important asset is our people. Our employees play an integral role in AGF's success. We have created an environment that inspires a sense of pride in our collective accomplishments, by focusing on culture, careers, capability and community.

AGF's Executive Management Team

Judy Goldring, LL.B, LL.D, ICD.D
Chief Executive Officer

Chris Jackson
President and
Chief Operating Officer

Ken Tsang
Chief Financial Officer

Ash Lawrence
Head of AGF Capital Partners

Blake C. Goldring, C.M., M.S.M., CD, LL.D., CFA
Executive Chairman

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Our Businesses and Capabilities

As an independent and diversified global asset management firm, AGF's companies bring a disciplined approach to delivering excellence in investing in the public and private markets through three distinct business lines: **AGF Investments, AGF Capital Partners** and **AGF Private Wealth**.

AGF | Investments™

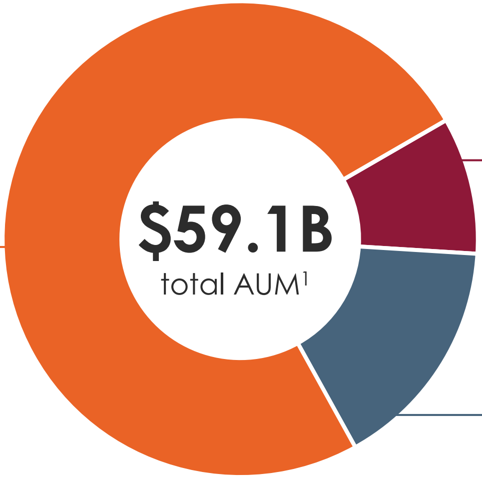
AGF | Capital Partners™

AGF | Private Wealth™

AGF Management Limited

Vertically integrated with broad investment capabilities

A diverse range of investment strategies within public and private markets for institutional and retail clients globally



AGF | Investments

- Equity
- Fixed Income
- Managed Solutions
- Alternative Real Assets
- Alternative Strategies

$45.1B AUM

AGF | Capital Partners

- Absolute Return
- Private Credit
- Private Equity
- Infrastructure
- Venture Capital

$4.5B AUM

AGF | Private Wealth

- Cypress Capital Management
- Doherty & Associates
- Highstreet Asset Management

$9.5B AUM

[1]Source: AGF Investments as of March 31, 2026. Represents assets under management by AGF Management Limited's ("AGF") investment management subsidiaries and fee earning assets in which AGF has carried interest ownership and earns recurring fees but does not have ownership interest in the managers. Expressed in Canadian dollars (C$).

Corporate Sustainability

Corporate Sustainability

Our Responsibility Today for a Sustainable Tomorrow ™

Guided by the thinking, "Our Responsibility Today for a Sustainable Tomorrow" we have developed a corporate responsibility framework that applies forward-thinking practices related to key sustainability factors to deliver long-term successful outcomes for each of our stakeholders.

We have identified the following key areas of focus that we believe are central to our firm's long-term success:

Sustainable Investing – Advancing responsible and sustainable investing practices across our respective companies' investment management teams.

Talent and Culture – Improving the employee experience by fostering high engagement, advancing diversity initiatives, ensuring equitable and inclusive practices, and attracting and nurturing talent with ongoing support and thoughtful succession planning.

Sustainable Operations & Governance – Managing the risks and opportunities related to AGF companies' operations and governance as well as our community involvement.

Community Giving

As part of AGF's commitment to corporate responsibility, we take an active approach to investing in the communities we both work in and live in.

AGF has a long-standing history of community involvement and working with organizations that support and align with our pillars of social responsibility:

Education – We help foster educational development and opportunities to invest in our future.

Diversity & Inclusion - We embrace diverse backgrounds, experiences and perspectives and champion social change.

Environment - We are considerate of our environmental impact and promote sustainability of our planet.

AGF's community giving initiatives come in the form of both financial support and employee engagement volunteering opportunities. We encourage our employees to engage in volunteer opportunities with organizations of their choice, and all employees are given a paid volunteer day every year.

Organizations We Support

- Compagnie Canada Company
- Canadian Chamber of Commerce / Chambre de Commerce du Canada
- Indspire — Indigenous education, Canada's future. | L'éducation des autochtones, L'avenir du Canada.
- Junior Achievement
- the prosperity project
- TREES FOR LIFE
- WE WOMEN IN ETFs
- United Way Centraide
- Ivey | Women in Asset Management
- VersaFi formerly WCM

Disclaimers

AGF Management Limited ("AGF"), a Canadian reporting issuer, is an independent firm composed of wholly owned globally diverse asset management firms. AGF's investment management subsidiaries include AGF Investments Inc. ("AGFI"), AGF Investments LLC (formerly FFCM LLC) ("AGFUS"), AGF International Advisors Company Limited ("AGFIA"), Highstreet Asset Management Inc. ("Highstreet"), Doherty & Associates Ltd. ("Doherty"), Cypress Capital Management Ltd. ("CCM") and Cypress Capital Management US Ltd. ("CCMUS"). AGFI, Highstreet, Doherty and Cypress are registered as portfolio managers across various Canadian securities commissions, in addition to other Canadian registrations. AGFUS and CCMUS are U.S. registered investment advisers. AGFIA is regulated by the Central Bank of Ireland and registered with the Australian Securities & Investments Commission. AGF investment management subsidiaries manage a variety of mandates composed of equity, fixed income and balanced assets. The term AGF may refer to one or more of the direct and indirect subsidiaries of AGF Management Limited or to all of them jointly. These terms are used for convenience and do not precisely describe any of the separate companies, each of which manages its own affairs.

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Invested in Discipline

To learn more visit **AGF.com**

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