

# QUICK FACTS: CANADA

December 31, 2025

Working with clients around the world, BNY Investments is made up of specialty investment managers delivering focused products to clients, with \$2.2 trillion in assets under management as of December 31, 2025. Partnering with our clients, big and small, we offer investment solutions managed by talented asset class specialists with distinct philosophies and proven approaches. Underpinned by the strength of BNY, we work across all parts of the financial lifecycle.

Investment services in Canada are offered through BNY Investments Canada registered as a Portfolio Manager and Exempt Market Dealer in all provinces and territories of Canada and as a Commodity

Trading Manager in Ontario. BNY Investments Canada is an indirect wholly-owned subsidiary of The Bank of New York Mellon Corporation. This information has been provided by BNY Investments Canada for use with institutional investors only and may not be redistributed without authorization.

BNY Investments is a division of BNY, which has \$59.3 trillion in assets under custody and/or administration as of December 31, 2025. BNY can act as a single point of contact for clients looking to create, trade, hold, manage, service, distribute or restructure investments. BNY is the corporate brand of The Bank of New York Mellon Corporation (NYSE: BK). Additional information is available on [www.bny.com](http://www.bny.com). Follow us on X @BNYglobal or visit our newsroom at <https://www.bny.com/corporate/global/en/about-us/newsroom.html> for the latest company news.

**\$2.2T\*** in assets under management  
(BNY as of December 31, 2025)

## With a global presence in...

Amsterdam	Greenwich	New York	Seoul
Atlanta	Hong Kong	Paris	Singapore
Boston	London	Philadelphia	Stockholm
Chicago	Los Angeles	Pittsburgh	Sydney
Dallas	Luxembourg	Pune	Taipei
Denver	Madrid	Rio de Janeiro	Tokyo
Dubai	Miami	San Francisco	Toronto
Edinburgh	Milan	Santiago	Zurich
Frankfurt	Moscow	São Paulo	

\*BNY as of December 31, 2025. Total assets under management (AUM) includes AUM attributable to the asset managers outlined in this file as well as BNY Mellon Investment Adviser, Inc, BNY Wealth and external data. AUM in USD.

**Not FDIC-Insured. Not Bank-Guaranteed. May Lose Value.**



# OUR INVESTMENT MANAGERS

Great minds don't think alike: the power of independent thinking.

## ARX INVESTIMENTOS \$10B

Brazilian equity; macro; corporate bonds and fixed income strategies.<sup>1</sup>

## DREYFUS \$468B

Leading liquidity solutions provider with a comprehensive array of cash and short duration strategies.<sup>2</sup>

## INSIGHT INVESTMENT \$852B

Leader in global fixed income and risk management solutions.<sup>3</sup>

## MELLON \$543B

A global leader in index management dedicated to precision and client partnership.<sup>2</sup>

## NEWTON \$112B

Active equities, income, absolute return, multi-asset, thematic and sustainable strategies.<sup>4</sup>

## WALTER SCOTT \$79B

Global equity investment management.<sup>5</sup>

AUM in USD as of December 31, 2025.

<sup>1</sup>ARX is the brand used to describe the Brazilian investment capabilities of BNY Mellon ARX Investimentos Ltda. ARX is a subsidiary of The Bank of New York Mellon Corporation. <sup>2</sup>Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation (BNY). MIC is composed of two divisions; BNY Investments Mellon (Mellon), which specializes in index management, and BNY Investments Dreyfus (Dreyfus), which specializes in cash management and short duration strategies. Securities are offered through BNY Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC. <sup>3</sup>Insight Investment - Investment advisory services in North America are provided through two different investment advisers registered with the Securities and Exchange Commission (SEC) using the brand Insight Investment: Insight North America LLC (INA) and Insight Investment International Limited (IIIL). The North American investment advisers are associated with other global investment managers that also (individually and collectively) use the corporate brand Insight. Insight is a subsidiary of The Bank of New York Mellon Corporation. <sup>4</sup>Newton Investment Management - BNY Investments Newton is the name for a group of affiliated companies that provide investment management services under the trading name of 'Newton' or 'Newton Investment Management'. Investment management services are provided in the United Kingdom by Newton Investment Management Ltd (NIM), and in the United States by Newton Investment Management North America LLC (NIMNA). <sup>5</sup>Walter Scott & Partners Limited (Walter Scott) is an investment management firm authorized and regulated by the Financial Conduct Authority, and a subsidiary of The Bank of New York Mellon Corporation.

# INVESTMENT STRATEGIES

	ARX	Dreyfus <sup>1</sup>	Insight	Mellon <sup>1</sup>	Newton <sup>2</sup>	Walter Scott
<b>Equity</b>						
Asia Pacific (Ex. Japan)				▼	▲	
Brazil	▲					
Developed (Ex. U.S.)				▼	▲	▲
Emerging Markets	▲			▼	▲	▲
European				▼	▲	▲
Global				▼	▲	▲
Pacific				▼		
Japan				▼		
Real Estate Securities (REITs)	▲			▼		
Smart Beta Equity Strategies					▲	
U.K.				▼	▲	
U.S.				▼	▲	▲
<b>Fixed Income</b>						
Asia Pacific				▼		
Cash Management (U.S., Euro, Sterling, Other)	▲	▲	▲			
Convertible Bonds			▲			
Core				▼	▲	
Core Plus			▲			
Corporate Credit	▲		▲	▼		
Direct Lending			▲			
Emerging Markets	▲		▲	▼		
European			▲	▼		
Global			▲	▼	▲	
Government/Sovereign Fixed Income		▲	▲	▼	▲	
High Yield			▲		▲	
Inflation-Linked			▲	▼		
Long Duration			▲	▼		
Mortgages			▲	▼		
Municipal Bonds			▲			
Senior Secured Loans			▼			
Short/Intermediate Duration		▲	▲	▼		
Structured Credit/ABS			▲	▼		
Tax-Sensitive			▲			
U.K.			▲	▼	▲	
U.S.		▲	▲	▼		
<b>Alternatives</b>						
Absolute Return	▲		▲		▲	
Global Macro					▲	
Hedge Funds	▲				▲	
Infrastructure					▲	
Market Neutral/Long-Short	▲				▲	
Master Limited Partnerships					▲	
Multi-Strategy	▲				▲	
Natural Resources/Commodities					▲	
Portable Alpha					▲	
Private Equity					▲	
Private Real Estate					▲	
<b>Solutions</b>						
Balanced/Multi-Asset Class	▲		▲▼	▼	▲▼	
Direct Indexing <sup>3</sup>				▼		
Dynamic Hedge Strategies (CPPI)			▲		▲	
FX/Currency Management			▲			
Liability-Driven Investing			▼			
Life Cycle/Target Date					▲▼	
Overlay/Futures/Swaps			▲	▼	▲	
Risk Parity					▲▼	
Tax Managed Equity <sup>4</sup>				▼		
Thematic				▼	▲	

▲ Active  
▼ Index/  
Enhanced  
■ Fund-of-  
Funds

The investment strategies identified in this table may not be available in all products or services provided by the specialist manager, and may not be available to all investors. Please consult with your BNY representative or a financial professional for additional information on how a particular strategy is managed. Please note: Not all strategies may be available to all investors in all markets. <sup>1</sup>Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation. MIC is composed of two divisions; Mellon, which specializes in index management, and Dreyfus, which specializes in cash management and short duration strategies. Securities are offered through BNY Mellon Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC. Note: Mellon's investment strategies are purely index. <sup>2</sup>"Newton" and/or "Newton Investment Management" is a corporate brand which refers to the following group of affiliated companies: Newton Investment Management Limited (NIM), Newton Investment Management North America LLC (NIMNA). NIMNA was established in 2021. <sup>3</sup>Mellon provides day-to-day investment advisory services. <sup>4</sup>Effective 1/1/25, BNY Wealth appointed MIC as Sub-adviser for its separately managed tax managed equity accounts.

BNY Investments Canada has been serving clients in Canada since its office opened in Toronto in 1996. It oversees the distribution of investment services offered by BNY's affiliated investment management firms and is one of the leading investment management organizations in Canada.

**For further  
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## Important information

**All investments involve risk including loss of principal. Certain investments involve greater or unique risks that should be considered along with the objectives, fees, and expenses before investing.**

BNY Investments is the brand name for the investment management business of BNY and its investment firm affiliates worldwide. BNY is the corporate brand of The Bank of New York Mellon Corporation and may be used to reference the corporation as a whole or its various subsidiaries generally.

Products or services described herein are provided by The Bank of New York Mellon Corporation, its subsidiaries, affiliates or related companies, and may be provided in various countries by one or more of these companies where authorized and regulated as required within each jurisdiction. However, this material is not intended, nor should be construed, as an offer or solicitation of services or products or an endorsement thereof in any jurisdiction or in any circumstance that is otherwise unlawful or unauthorized. All investments involve risk, including the possible loss of principal. Certain investments involve greater or unique risks that should be considered along with the objectives, fees, and expenses before investing.

Unless otherwise noted, all references to assets under management (which are approximate) are as of December 31, 2025.

Personnel of certain of our BNY affiliates may act as: (i) registered representatives of BNY Mellon Securities Corporation (in its capacity as a registered broker-dealer) to offer securities and certain bank-maintained collective investment funds, (ii) officers of the Bank of New York Mellon (a New York chartered bank) to offer bank-maintained collective investment funds, and (iii) Associated Persons of BNY Mellon Securities Corporation (in its capacity as a registered investment adviser) to offer separately managed accounts managed by BNY Investments firms.

Mellon Investments Corporation (MIC) is a registered investment adviser and subsidiary of The Bank of New York Mellon Corporation (BNY). MIC is composed of two divisions; BNY Investments Mellon (Mellon), which specializes in index management, and BNY Investments Dreyfus (Dreyfus), which specializes in cash management and short duration strategies. Securities are offered through BNY Mellon Securities Corporation (BNYSC), a registered broker-dealer and affiliate of MIC. Where applicable, AUM includes discretionary and non-discretionary assets and assets managed by investment personnel acting in their capacity as officers of affiliated entities; and where cited, Responsible Investing assets include assets managed in custom strategies and assets managed in accordance with client-directed guidelines. Insight Investment advisory services in North America are provided through two different investment advisers registered with the Securities and Exchange Commission (SEC), using the brand Insight Investment: Insight North America LLC (INA) and Insight Investment International Limited (IIIL). The North American investment advisers are associated with other global investment managers that also (individually and collectively) use the corporate brand Insight Investment and may be referred to as "Insight" or "Insight Investment." "Newton" and/or the "Newton Investment Management" brand refers to Newton Investment Management Limited. Newton is incorporated in the United Kingdom and is authorized and regulated by the Financial Conduct Authority in the conduct of investment business. Newton is registered with the U.S. Securities and Exchange Commission (SEC) as an investment adviser. Newton is a subsidiary of BNY. Walter Scott North America, a division of BNY Mellon Securities Corporation a registered broker dealer. BNY Mellon Advisors, Inc. personnel may offer products and services in their capacity as employees and officers of The Bank of New York Mellon (the "Bank"), including investment strategies that are developed by affiliated BNY investment advisory firms and managed by officers of such firms acting in their capacities as dual officers of the Bank. BNY Mellon Advisors, Inc. is an investment adviser registered as such with the U.S. Securities and Exchange Commission (SEC) pursuant to the Investment Advisers Act of 1940, as amended. BNY Mellon Advisors, Inc. is a subsidiary of The Bank of New York Mellon Corporation. BNY Mellon ARX (ARX) is the brand used to describe the Brazilian investment capabilities of BNY Mellon ARX Investimentos Ltda. ARX is an affiliate of The Bank of New York Mellon Corporation.

Insight Investment International Limited, Newton Investment Management Limited and Walter Scott & Partners Limited are authorized and regulated by the Financial Conduct Authority. The registered address for Insight Investment International Limited and Newton is BNY Mellon Centre, 160 Queen Victoria Street, London, EC4V 4LA, England. The registered address for Walter Scott is One Charlotte Square, Edinburgh, EH2 4DR, Scotland.

Investment advisory services in North America are provided through two different investment advisers registered with the Securities and Exchange Commission (SEC), using the brand Insight Investment: Insight North America LLC (INA) and Insight Investment International Limited (IIIL). INA and IIIL are part of 'Insight' or 'Insight Investment', the corporate brand for certain asset management companies operated by Insight Investment Management Limited including, among others, Insight Investment Management (Global) Limited (IIMG), Insight Investment International Limited (IIIL), and Insight Investment Management (Europe) Limited (IIMEL). INA is a registered investment adviser under the Investment Advisers Act of 1940 and regulated by the US Securities and Exchange Commission.

"Newton" and/or "Newton Investment Management" is a corporate brand which refers to the following group of affiliated companies: Newton Investment Management Limited (NIM), Newton Investment Management North America LLC (NIMNA). NIMNA was established in 2021. In the United Kingdom, NIM is authorised and regulated by the Financial Conduct Authority ("FCA"), 12 Endeavour Square, London, E20 1JN, in the conduct of investment business. Registered in England no. 01371973. NIM and NIMNA are both registered as investment advisors with the Securities & Exchange Commission ("SEC") to offer investment advisory services in the United States. NIM's and NIMNA's investment businesses in the United States is described in their Form ADVs, Part 1 and 2, which can be obtained from the SEC.gov website or obtained upon request. Both firms are indirect subsidiaries of The Bank of New York Mellon Corporation ("BNY").

Newton's assets under management are as of the most recent quarter end, unless noted otherwise. Newton's assets under management include assets collectively managed by NIM and NIMNA. In addition, AUM for Newton includes assets of bank-maintained collective investment funds for which Newton has been appointed sub-advisor, where Newton personnel act as dual officers of affiliated companies and assets of wrap fee account(s) for which Newton provides sub-advisory services to the primary manager of the wrap program.

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