

# WESTERN PENSION PLAN INVESTMENT OPTIONS

Members of the Academic & Administrative Staff Pension Plans allocate the investment of their account among the following 13 options. Weightings noted below reflect the target allocations. For a full description sign in to your Sun Life account and view the reports under Investment Performance.

**Pre-set Portfolios of the Diversified Bond Fund & Diversified Equity Fund, with a rebalancing feature**

**Balanced Income**  
(Mix of 70% Diversified Bond Fund & 30% Diversified Equity Fund)

**Balanced Growth *\*default\****  
(Mix of 30% Diversified Bond Fund & 70% Diversified Equity Fund)

**Diversified Portfolios of Bonds OR Equities**

**Diversified Bond Fund**

- 13.5% - 31% Canadian Bonds (active)
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- 32.5% - 50% Global Bonds (active)
- 10% Commercial Mortgages
- 26.5% Canadian Bond Fund (passive)

**Diversified Equity Fund**

- 10% Emerging Markets
- 5% Global (small cap)
- 10% Global low volatility
- 35% Global (large cap)
- 10% US Equity Fund – Unhedged (large cap)
- 10% Non North American Equity Fund
- 20% Canadian Equity Fund

**Strategy-specific funds**

**Canadian Bond Fund**  
(passive)

**Long Term Bond Fund**

**Canadian Equity Fund**

**Non North American Equity Fund**

**US Equity Fund – Unhedged (\$US)**

**US Equity Fund- Hedged (\$Cdn)**

**Socially Resp. Global Equity Fund**

**Money Market Fund**

**Guaranteed Daily Interest Account**

**Cash**

**Fixed Income/Bonds**

**Equity/Stocks**