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## AGF's Award-Winning History: 1995-2011

December 2011

Investment management firm AGF has a long history of being recognized in the industry for its fund management, advisor services, leadership and marketing efforts. Over the years, both the Canadian Investment Awards and the Canadian Lipper Awards have presented AGF with a number of accolades and recognition for our commitment to excellence in money management.

### Canadian Investment Awards

The Morningstar® Canadian Investment Awards (CIA) recognize leading investment products and firms illustrating an enduring commitment to excellence within the Canadian financial services industry.

In December 2011, AGF Emerging Markets Fund won the Emerging Markets Equity Fund Award for the sixth time and was praised for its consistent long-term high performance.

Since 2001, a number of AGF funds have been multiple Canadian Investment Award winners:

- AGF European Equity Class (five-time winner)
- AGF Global Government Bond Fund (four-time winner)
- AGF Emerging Markets Fund (sixth-time winner)
- AGF Precious Metals Fund (three-time winner)
- AGF Global Financial Services Class (two-time winner)

AGF also received the following specialty awards:

- Advisors' Choice Investment Fund Company of the Year, 2006 & 2008
- Person of Influence Award, 2007 – Blake C. Goldring, AGF Management Limited Chairman and Chief Executive Officer

### Fundata FundGrade Awards

In September 2011, Fundata Canada Inc. held its inaugural award celebration to recognize investment funds that achieved an 'A' rating under their FundGrade system.

Fundata's FundGrade is an independent and objective investment-fund rating system that has been developed to recognize funds with a track record of first-rate performance, helping investors identify funds with exceptional performance.

To achieve an 'A' grade, a fund must demonstrate strong historical performance relative to the amount of accompanying risk. Only funds that outperform their peers and are in the top 10% of funds in each category earn an 'A' grade.

Five AGF funds – AGF Elements Yield Portfolio, AGF Emerging Markets Fund, AGF Global Resources Class, AGF Monthly High Income Fund and Acuity Fixed Income Fund - were recognized for achieving the coveted FundGrade 'A' rating.

### **Canadian Lipper Awards**

The Canadian Lipper Awards program highlights funds that have excelled in delivering consistently strong risk-adjusted performance, relative to peers. Trophies are presented to fund families (Equity, Bond, Mixed Assets and Overall) and to funds that top their respective CIFSC classifications.

This year (February 2011), AGF received two Lipper Awards. Elements Yield Portfolio won the award for best 3-year returns in its Global Fixed Income Balanced category, while AGF Emerging Markets Fund won for best 10-year returns in the Emerging Markets Equity category.

In February 2010, AGF Emerging Markets Fund won two Lipper awards – a trophy as Best Emerging Markets Fund for three-year returns and a certificate for best five-year returns in the Emerging Markets Equity category. This Fund was also recognized with a certificate at the 2009 Lipper Awards for the best five-year returns.

At the 2009 Lipper awards, AGF was honoured as Best Overall Fund Family and Best Mixed Asset Fund Family for having the best risk-adjusted performance, within the equity and mixed-asset classes, over a three-year period ending December 31, 2008.

AGF Canadian Balanced Fund won three Lipper awards in 2009 – a trophy as Best Canadian Equity Balanced Fund for one-year returns and two certificates for best three- and five-year returns in the Canadian equity balanced category. This Fund was also recognized with a certificate at the 2007 Lipper Awards for the best one-year returns.

Here is a complete history of AGF's wins since the Canadian Investment Awards were handed out in 1995, the Canadian Lipper Awards were introduced in Canada in 2007 and Fundata Canada began recognizing funds with FundGrade 'A' ratings in 2011:

**2011 Morningstar® Canadian Investment Award Winners (1 award)**

**Fund Awards:**

- **AGF Emerging Markets Fund** for Best Emerging Markets Equity Fund

**2011 Fundata FundGrade Award Winners (5 awards)**

**Fund Awards:**

- **AGF Elements Yield Portfolio:** achieved a FundGrade ‘A’ rating in the Global Fixed Income Balanced category for superior risk-adjusted performance over a time weighted average of 2, 3 and 5 years
- **AGF Emerging Markets Fund:** achieved a FundGrade ‘A’ rating in the Emerging Markets Equity category for superior risk-adjusted performance over a time weighted average of 2, 3, 5 and 10 years
- **AGF Global Resources Class:** achieved a FundGrade ‘A’ rating in the Natural Resources Equity category for superior risk-adjusted performance over a time weighted average of 2, 3, 5 and 10 years
- **AGF Monthly High Income Fund:** achieved a FundGrade ‘A’ rating in the Canadian Equity Balanced category for superior risk-adjusted performance over a time weighted average of 2, 3 and 5 years
- **Acuity Fixed Income Fund:** achieved a FundGrade ‘A’ rating in the Canadian Fixed Income Balanced category for superior risk-adjusted performance over a time weighted average of 2, 3, 5 and 10 years

**2011 Canadian Lipper Award Winners (3 awards)**

**Fund Awards:**

- **AGF Emerging Markets Fund:** best 10-year returns in the Emerging Markets Equity category
- **AGF Elements Yield Portfolio:** best 3-year returns in the Global Fixed Income Balanced category
- **Acuity Diversified Income Class A:** best 1-year returns in the Global Fixed Income Balanced category

**2010 Canadian Investment Award Winners (2 awards)**

**Fund Awards:**

- **AGF Emerging Markets Fund** for Best Emerging Markets Equity Fund

- **AGF Canadian High Yield Bond Fund** received the Bronze award in the High Yield Fixed Income Fund category

**2010 Canadian Lipper Award Winners (2 awards)**

Fund Awards:

- **AGF Emerging Markets Fund:** best 3- and 5-year returns in the Emerging Markets Equity category

**2009 Canadian Investment Award Winners (5 awards)**

Fund Awards:

- **AGF Emerging Markets Fund** for Best Emerging Markets Equity Fund
- **AGF Global High Yield Bond Fund** received the Silver award in the High Yield Fixed Income Fund category
- **AGF Canadian Balanced Fund** received the Silver award in the Canadian Balanced Fund category
- **AGF European Equity Class** received the Silver award in the European Equity Fund category, and
- **AGF Global Resources Class** received the Bronze award in the Natural Resources Equity Fund category

**2009 Canadian Lipper Award Winners (9 awards)**

Group Awards:

- **AGF Funds Inc.:** Best Overall Fund Family
- **AGF Funds Inc.:** Best Mixed Asset Fund Family

Fund Awards:

- **AGF Canadian Balanced Fund:** best 1-, 3- and 5-year returns in the Canadian Equity Balanced category
- **AGF Elements Yield Portfolio:** best 1-year returns in the Global Fixed Income Balanced category
- **AGF Global Real Estate Equity Class:** best 1-year returns in the Real Estate Equity category
- **AGF Global Health Sciences Class\*:** best 3-year returns in the Health Equity category

- **AGF Emerging Markets Fund:** best 5-year returns in the Emerging Markets Equity category

\* AGF Global Health Sciences Class merged into AGF Global Equity Class effective May 22, 2009.

### 2008 Canadian Investment Award Winners (4 awards)

#### Specialty Award:

- AGF is chosen as **Advisors' Choice Investment Fund Company of the Year**
- **AGF's Tristan Sones and Alice Popescu** were honoured as AGF shared the top prize in the YMCA Outstanding Investment in Youth Awards

#### Fund Awards:

- **Highstreet Canadian Equity** won the Canadian Equity Pooled Fund. This fund is managed by Highstreet Asset Management, part of AGF Asset Management Group.
- **AGF Canadian Large Cap Dividend Fund** received the Silver award in the Canadian Dividend & Income Equity Fund category

### 2008 Canadian Lipper Award Winners (2 awards)

#### Fund Awards:

- **AGF Precious Metals Fund:** best 5-year returns in the Precious Metals Equity Funds category
- **AGF China Focus Class:** best 10-year returns in the Miscellaneous Funds category

### 2007 Canadian Investment Award Winners (4 awards):

#### Specialty Award:

- **AGF Management Limited Chairman and CEO Blake C. Goldring** wins coveted 2007 Person of Influence Award

#### Fund Awards:

- **AGF Emerging Markets Fund** for Best Emerging Markets Equity Fund
- **AGF Precious Metals Fund** for Best Precious Metals Equity Fund
- **AGF European Equity Class** for Best European Equity Fund

**2007 Canadian Lipper Award Winners (5 awards):**

Fund Awards:

- **AGF Canadian Balanced Fund:** best 1-year returns in the Canadian Income Balanced category
- **AGF China Focus Class:** best 5-year returns in the Asia ex-Japan Equity category
- **AGF Global Financial Services Class:** best 5-year returns in the Financial Services category
- **AGF Precious Metals Fund:** best 5-year returns in the Precious Metals category
- **AGF Canadian Resources Fund:** best 10-year returns in the Natural Resources category

**2006 Canadian Investment Award Winners (6 awards):**

Specialty Award:

- AGF wins top prize for **Advisors' Choice Favourite Investment Fund Company of the Year**

Fund Awards:

- **AGF International Stock Class** for Best International Equity Fund
- **AGF Global Financial Services Class** for Best Financial Services Equity Fund
- **AGF Emerging Markets Fund** for Best Emerging Markets Equity Fund
- **AGF Precious Metals Fund** for Best Precious Metals Equity Fund
- **AGF European Equity Class** for Best European Equity Fund

**2005 Canadian Investment Award Winners (2 awards):**

Fund Awards:

- **AGF Global Government Bond Fund** for Best Foreign Bond Fund
- **AGF Emerging Markets Fund** for Best Emerging Markets Equity Fund

**2004 Canadian Investment Award Winners (4 awards):**

Specialty Awards:

- **AGF's Tristan Sones and Tom Nakamura** win YMCA Investment and Values Challenge Award

Fund Awards:

- **AGF Global Government Bond Fund** for Best Foreign Bond Fund
- **AGF Global Financial Services Class** for Best Financial Services Equity Fund
- **AGF Precious Metals Fund** for Best Precious Metals Equity Fund

2003 Canadian Investment Award Winners (5 awards):Fund Awards:

- **AGF European Equity Class** for Best European Equity Fund
- **AGF Global Government Bond Fund** for Best Foreign Bond Fund

Marketing Awards:

- AGF's Montreal Canadiens Hockey Cards for Best Overall Campaign
- AGF's Montreal Canadiens Hockey Cards for Best Out-of-Home
- AGF Mutual Fund Basics Brochure for Best Print Collateral

2002 Canadian Investment Award Winners (3 awards):Fund Awards:

- **AGF European Equity Class** for Best European Equity Fund
- **AGF Global Government Bond Fund** for Best Foreign Bond Fund

Marketing Awards:

- AGF Group of Funds ('Building Great Portfolios') for Best Print Collateral

2001 Canadian Investment Award Winners (5 awards):Fund Awards:

- **AGF European Equity Class** for Best Regional Equity Fund
- **AGF International Value Fund** for Best Global Equity Fund

Marketing Awards:

- AGF Group of Funds for Best Print Collateral
- AGF Group of Funds for Best Print Advertising

- AGF Group of Funds for Best Overall Campaign

**2000 Canadian Investment Award Winners (4 awards):**

Fund Awards:

- **AGF Aggressive™ Growth Fund** for Best U.S. Equity Fund
- **AGF International Value Fund** for Best Global Equity Fund

Marketing Awards:

- AGF Group of Funds for Best Print Advertising
- AGF Group of Funds for Best Overall Campaign

**1999 Canadian Investment Award Winners (1 award):**

Fund Awards:

- **AGF International Value Fund** for Best Global Equity Fund

**1998 Canadian Investment Award Winners (2 awards):**

Specialty Award:

- **AGF Co-Founder C. Warren Goldring** was awarded the Career Achievement Award

Fund Awards:

- **AGF American Growth Class** for Best U.S. Equity Fund

**1997 Canadian Investment Award Winners (1 award):**

Fund Awards:

- **AGF International Value Fund** for Best International Equity Fund

**1995 Canadian Award Winners (2 awards):**

Fund Awards:

- AGF Management Limited for Best Asian Equity Fund
- AGF Management Limited for Best International Bond Fund

### **About AGF Management Limited**

AGF Management Limited is one of Canada's premier independent investment solutions firms with offices across Canada and subsidiaries around the world. AGF's products include a diversified family of award-winning mutual funds, mutual fund wrap programs and pooled funds. AGF also manages assets on behalf of institutional investors including pension plans, foundations and endowments as well as for private clients. In addition, AGF Trust is a complementary business that offers GICs, loans and mortgages through the financial advisor and mortgage broker channels. With approximately \$47 billion in total assets under management, AGF serves more than one million investors. AGF trades on the Toronto Stock Exchange under the symbol AGF.B.

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