



What are you doing after work?®

A profile of the Canadian investor

2014 AGF INVESTOR PERSPECTIVES SURVEY

INVESTMENT KNOWLEDGE AND INVOLVEMENT

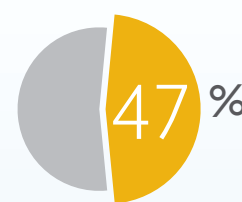
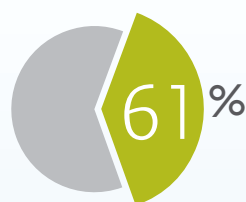
Overall, Canadians report a relatively low investment knowledge level with 71% saying they are somewhat knowledgeable or not knowledgeable at all. The percentage of investors citing a higher level of investment knowledge significantly increases with wealth and males are more likely than females to say they are knowledgeable.

VALUE OF ADVICE

Roughly three in five (61%) Canadians have a financial advisor but almost half of Canadians indicate they are not actively involved in managing their investments. Those who cite a high level of investment knowledge are significantly more likely than those with low knowledge to say they 'make every decision' or are 'very involved' with their investments.

AGE IS A FACTOR

On average, those aged 35-44 are more likely to identify long-term returns as the most important factor when making investment decisions; whereas, those aged 55+ were more likely to cite reliance on their financial advisor. As expected, the closer one gets to retirement the more conservative they expect to become (59%), but it is interesting to note older and wealthier respondents are still leaning towards growth.



More than three in five (61%) Canadians have a financial advisor

but roughly half say they are only somewhat involved or have little involvement with their investments



71%

Almost three-quarters of Canadians say they are somewhat knowledgeable, or not knowledgeable at all when it comes to investing



Males are more likely than females to say they are highly knowledgeable