

Mission Statement

Mission

At McGill University, we are committed to providing a world-class education and research environment for our students and faculty. We are dedicated to the pursuit of knowledge and the advancement of society through our academic programs and research initiatives. Our mission is to foster a culture of excellence, innovation, and social responsibility, and to ensure that our students are well-prepared to meet the challenges of the future.

Principles

At McGill University, we are committed to the following principles: academic excellence, social responsibility, and the advancement of knowledge. We strive to create a supportive and inclusive environment for all members of our community, and we are dedicated to the highest standards of integrity and ethical conduct.

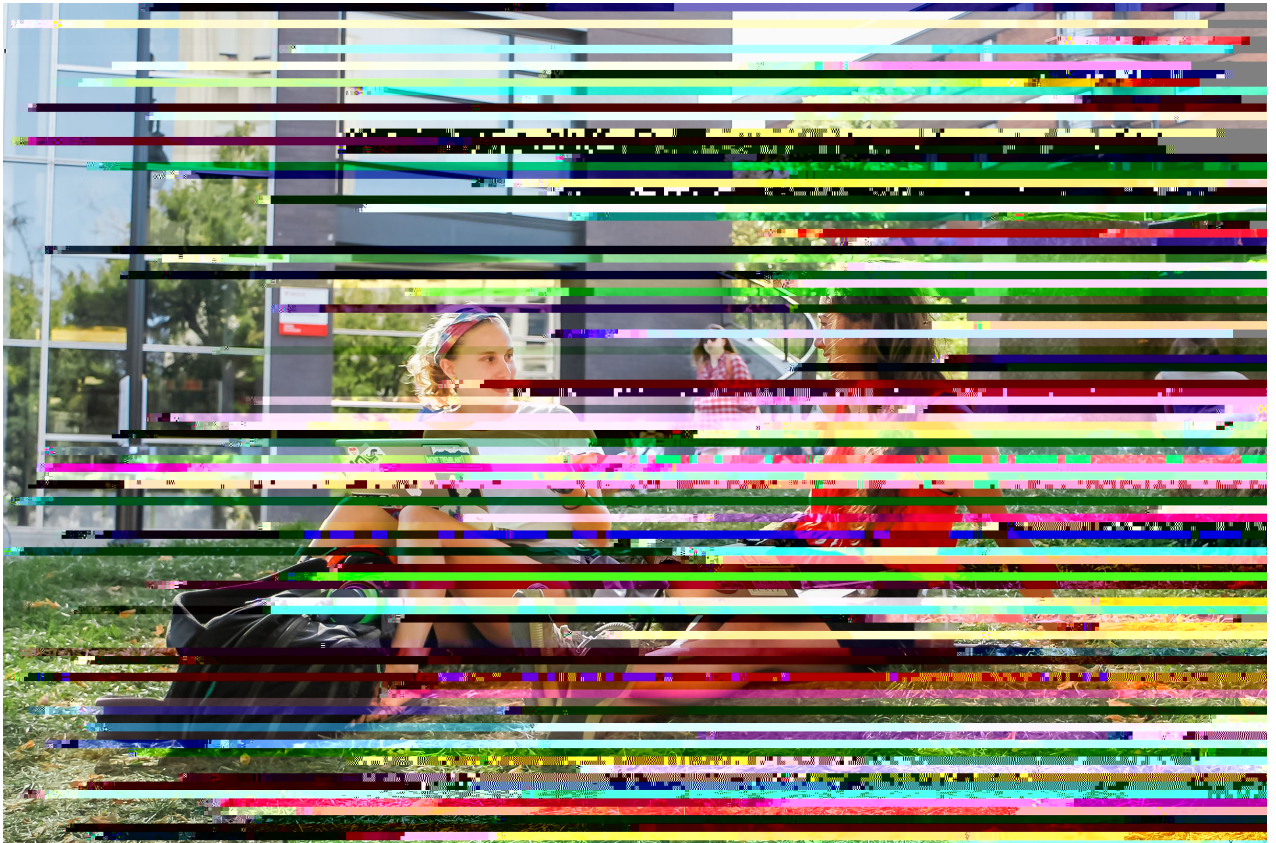


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Message from the Chair of the Investment Committee

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Donald Lewtas

Chair, McGill Investment Committee

Fiscal Year 2024 Highlights

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30, 2024

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Overview of the Endowment Fund



The Endowment Fund is a critical component of the University's financial structure, providing a steady stream of income to support various academic and research initiatives. The fund's performance is closely monitored, and its growth is essential for the long-term sustainability of the University's operations. The fund's assets are managed in a prudent and diversified manner, ensuring that the income generated is sufficient to meet the University's needs. The fund's performance is closely monitored, and its growth is essential for the long-term sustainability of the University's operations. The fund's assets are managed in a prudent and diversified manner, ensuring that the income generated is sufficient to meet the University's needs.

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30, 2024.

About the Endowment Fund

The Endowment Fund is a permanent fund established to provide a source of income for the University. The fund is managed by the Board of Trustees and is used to support the University's educational and research programs. The fund is composed of various assets, including real estate, stocks, and bonds. The income generated from the fund is used to support the University's operations and to provide financial aid to students. The fund is a critical part of the University's financial structure and is essential for its long-term success.

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Governance Framework

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Brandon Haley &
Donor, BEng'99

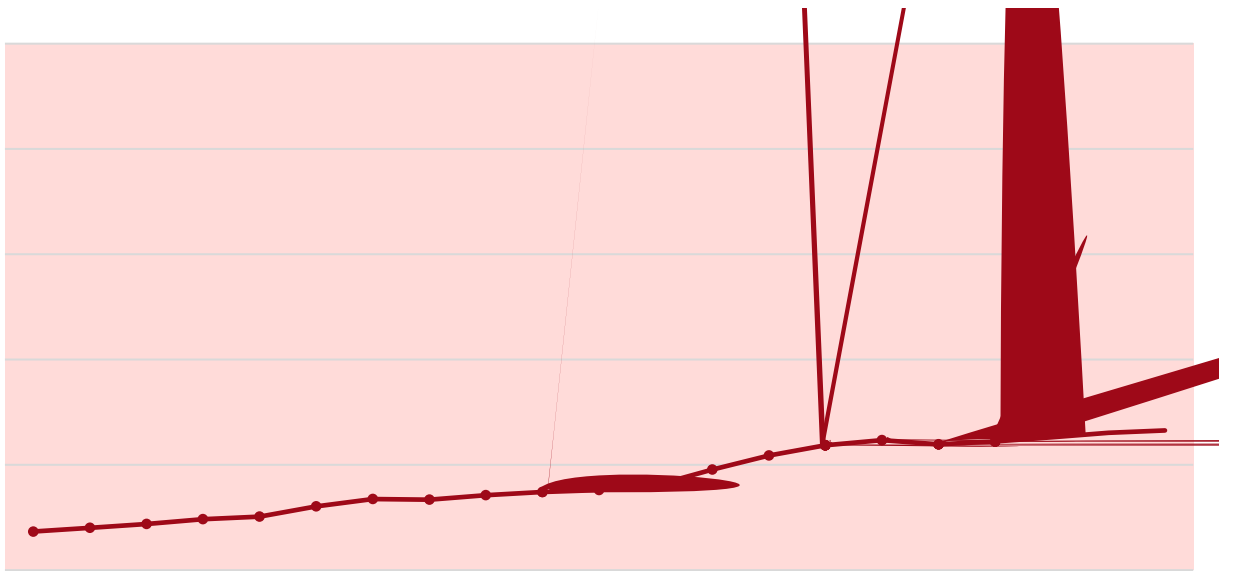
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Dr. Yolande E. Chan

Dean & James McGill Professor,
McGill Desautels Faculty of Management



...the ... **\$100** ...

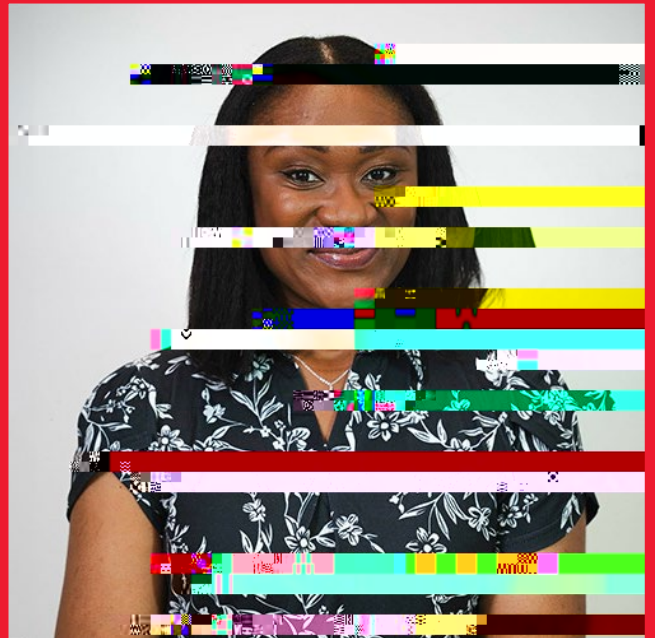


How the Endowment Supports the McGill Community

Rachael Osagie

PhD, Year 2

Recipient of the J.W.
McConnell Memorial
Fellowship



As a recipient of the J.W. McConnell Memorial Fellowship, Rachael Osagie is supported in her research and academic pursuits. The fellowship provides her with the financial resources needed to focus on her studies and contribute to the McGill community. Rachael is currently in her second year of her PhD program, where she is exploring the intersection of culture and technology in her research. Her work is highly regarded, and she is actively engaged in various academic and community activities. The fellowship not only supports her academic excellence but also allows her to participate in conferences and workshops, furthering her knowledge and professional development. Rachael's presence at McGill is a testament to the impact of the endowment in supporting diverse and talented students like her.

Investment Management

170, 11. The first step in the investment process is to identify the client's needs and objectives. This involves understanding the client's risk tolerance, investment horizon, and liquidity requirements. The second step is to develop an investment strategy based on these needs and objectives. This strategy should be based on a thorough analysis of the market and the client's financial situation. The third step is to select the investments that will be used to implement the strategy. This involves choosing the right mix of assets and securities. The fourth step is to monitor the investments and make adjustments as needed. This involves regularly reviewing the portfolio and making changes to the asset allocation and security selection as the market and the client's needs evolve.

The investment process is a continuous one, and it is important to stay up-to-date on market developments and changes in the client's needs and objectives. This involves staying informed about the latest research and analysis, and being prepared to make adjustments to the investment strategy as needed. The investment process is a complex one, and it is important to work with a professional investment manager who has the expertise and experience to help you achieve your financial goals. (Investment Management)

Portfolio Management

The first step in portfolio management is to define the investor's objectives and risk tolerance. This involves determining the desired return, the acceptable level of risk, and the time horizon for the investment. Once these goals are established, the next step is to identify the assets that are available for investment. This includes both public and private assets, such as stocks, bonds, real estate, and private equity. The third step is to analyze the performance and risk characteristics of these assets. This is typically done using historical data and statistical models. The final step is to construct a portfolio that meets the investor's objectives and risk tolerance. This involves selecting the appropriate mix of assets and determining the weights for each asset in the portfolio.

Portfolio management is a complex task that requires a deep understanding of financial markets and investment principles. It involves a continuous process of monitoring and adjusting the portfolio to ensure it remains aligned with the investor's goals and risk tolerance. There are several key factors that can influence the performance of a portfolio, including market conditions, asset selection, and portfolio construction. One of the most important factors is the diversification of the portfolio. Diversification helps to reduce the risk of the portfolio by spreading the investments across different assets and sectors. Another key factor is the timing of the investments. The timing of the investments can have a significant impact on the overall performance of the portfolio. Finally, the quality of the assets in the portfolio is also a critical factor. Investing in high-quality assets can lead to better long-term performance. Overall, portfolio management is a dynamic and ongoing process that requires careful attention and expertise.

Performance

Performance Metrics (%)		
As of 30, 2024		
1	4	10



