

OUR STRATEGY

To make OMERS a sustainable, affordable and meaningful defined benefit Plan

OMERS
Long-Term Aspirations
The Road to 2030

We face a complex, challenging environment...

HIGH VALUATIONS & COMPETITIVE MARKET

GEOPOLITICAL INSTABILITY

RAPID DISRUPTION ACROSS INDUSTRIES

VOLATILE INTEREST RATES

CPP EXPANSION

GOVERNMENT CHANGES

... and substantial structural challenges going forward



Plan maturity



Changing nature of work



Longer life expectancy



Sustaining long term returns

INSTITUTIONAL RESILIENCY

FINANCIAL RESILIENCY

GOVERNANCE



V. Operations

Advance our operational capabilities

- 1) Build and retain diverse **Talent Depth** across the organization
- 2) Enhance our **Data and Technology** capabilities
- 3) Leverage cost-control and fee offsets to **Manage Costs**



IV. Engagement

Improve stakeholder trust and understanding

- 1) **Enhance and Align Stakeholder Engagement**
- 2) Enhance the **Pension Services** delivery method
- 3) Increase focus on **Government Relations**



RISK MANAGEMENT



I. Plan Design

Evolve OMERS offering to meet stakeholders' and sustainability needs

- 1) Ensure **Plan Sustainability** via appropriate Plan design
- 2) Explore how to **Modernize the Plan** and improve its relevance
- 3) Jointly find ways to **Simplify the Plan**
- 4) Consider options to **Grow the Plan**



II. Funding

Manage funding and ALM levers to ensure the Plan's financial health

- 1) Develop a **Joint Funding Framework** to manage the value proposition
- 2) Update the **Funding Management Strategy**
- 3) Evolve our **Discount Rate** approach to manage risk
- 4) Conduct **Asset-Liability Management** studies



III. Investment

Maintain a diverse investment portfolio that meets risk/return hurdles

- 1) Deliver a clear **Total Portfolio Strategy** within our risk-return targets
- 2) Continue to actively incorporate **Environmental, Social and Governance** factors
- 3) Improve the Plan's **Global Diversification**
- 4) Expand our **Strategic Partnerships**

A member-first service-oriented platform delivering exceptional value and service

A governance model that is effective and collaborative

A world-class investment platform, highly focused on the right strategic markets and partners

A disciplined, prudent and risk-conscious steward that meets the changing needs of stakeholders

An industry-leading employer with an exceptional workplace environment



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