

# 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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