



2026 NATIONAL INTEGRATED SPECIAL REPORT –  
DIGITAL AND NEWSPAPER

Investment Funds & Trends

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### Strategic wealth transfer

Monday, November 18, 2025 Produced by Randall Anthony Communications. The Globe's Editorial Department was not involved.

Sharing good fortune

Significant gifts to charities keep wealthy families' legacies on their side for the next generation.

It's a tradition that has been passed down for generations. Wealthy families have long used philanthropy as a way to give back and ensure their legacies live on. In recent years, this tradition has taken on new meaning as the next generation of wealthy families seeks to make a difference in the world while also ensuring their families' financial future.

For many wealthy families, philanthropy is not just a way to give back, but a way to ensure their families' financial future. By donating to charities, they can ensure their families' legacies live on and that their families' financial future is secure.

Philanthropy is a way to give back and ensure your family's financial future. By donating to charities, you can ensure your family's legacies live on and that your family's financial future is secure.

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There's more to wealth than money

While most of the focus is on the money, there's more to wealth than money. It's about the values and traditions that are passed down from generation to generation. It's about the legacy that is built and the impact that is made.

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From AI-driven analysis to alternative asset growth, the structure and strategy of investment funds are evolving in 2026. In a year shaped by regulatory change, geopolitical uncertainty, and the growing influence of technology, both institutional and retail investors are rethinking allocation and strategy. This special feature will examine how Canadians are adapting to new market realities, highlighting the trends, risks, and innovations shaping capital management today.

- Proposed topic highlights:**
- Macro & Capital Flows** — The forces driving global fund performance, from rising rates to cross-border capital shifts.
  - ESG & Impact Evolution** — How climate transition, biodiversity, human capital, and regulation are reshaping fund mandates.
  - AI, Data & Quant Innovation** — The rise of AI platforms in investment decisioning, predictive modelling, and operational efficiencies.
  - Active vs. Passive Dynamics** — How investor sentiment and fund flows are redefining the balance between active management, passive funds, and alternative strategies.
  - Private Markets & Alternatives** — The growing influence of private equity, credit, infrastructure and how funds are navigating illiquidity and valuation risk.
  - Risk, Resilience & Transition** — Measuring transition risk, carbon exposure, and how funds can build more resilient portfolios.

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Reaching more High-Net-Worth Investors with over \$500K in assets.

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Print Weekly Readers – 2,417,000 | Digital Weekly Readers – 3,636,000

Source: Vividata SCC Fall, 2024, National, Adults 18+

Sponsor Content and Brand Ad Booking Deadline	Material Deadline	Publishing Date
January 23	March 6	March 13
September 4	October 9	October 16