

PGM Global, winner of

BEST TRANSITION MANAGEMENT TEAM NORTH AMERICA 2022

BEST GLOBAL PORTFOLIO STRATEGY TEAM NORTH AMERICA 2022

from Capital Finance International (CFI.co)

We are proud to announce that, PGM has won **Best TM Team for North America**, for a FOURTH year in a row, and **Best Global Portfolio Strategy Team North America**, for a THIRD year in a row, from Capital Finance International (CFI.co), a magazine based in the UK. These wins are another affirmation of PGM's focus on client service and the partnerships we strive to build with our clients.

The CFI.co judging panel's reports:

Best Transition Management Team North America 2022



PGM Global is a boutique investment firm with headquarters in Montreal. It specialises in securities trading, transition management and global macro research. PGM Global runs its trading desk day and night throughout the workweek, reaching \$78bn in annual trade volume. PGM's transition management service brings all investment types — equities, fixed income and currency — across its trading desk. The firm assists clients to update the structure of their portfolios in the most efficient and cost-effective manner possible. It conducts an exhaustive pre-transition analysis to chart a smart trading strategy, with special attention paid to managing the opportunity cost. It helps clients save time and money through competitive commissions, strategic executions, coordinated custodial communication and well-managed risk exposures. It settles transition trades with prompt efficiency and offers flexible-reporting options that promote transparency and reduced operational risks. PGM's transition management projects increased more than 40 percent over the previous year. The firm continues to add new clients from around the globe. In 2022, PGM Global helped clients make small tweaks and wholesome changes to their portfolios as well as trimming when necessary. PGM Global first registered on the CFI.co radar in 2019, earning praise from the judging panel for its transparent pricing schedule and conflict-free executions. The company continues to find favour in the awards programme, as the jury has unanimously voted for PGM Global in the category of Best Transition Management Team (North America, 2022).

"We work with our clients from the initial stage of global portfolio advice through to implementation," says Mario Choueiri, head of Global Transition Management. "The focus is on rigorous project management, coupled with unparalleled client communication," he says. "The success of the business has been driven by commitment and dedication to client goals. We tailor our service offering to best meet our client needs, and always provide full transparency on our pricing and trade execution."

Best Global Portfolio Strategy Team North America 2022



PGM Global brings over 50 years of experience in the securities industry to help clients master international markets. It has established a homebase in North America, with headquarters in Montreal, but its reach and expertise extends worldwide. The boutique firm operates a trading desk — 24 hours a day, five days a week, \$78bn annual trading volume — that plays a crucial part in the execution of transition management services. It works with institutional investors to execute trading in equities, fixed income and currencies. In addition to trading and transition, the PGM team also specialises in global macro research. The team distils global macro trends into concise trades ideas tailored to client's needs. Despite the current economic environment, PGM Global has found 2022 to be an active year with an uptick in projects. Clients appreciate the high calibre and extensive scope of PGM's research capabilities. The team is travelling more since Covid restrictions have loosened, prospecting internationally for new clientele and establishing touchpoints across its operational sphere. PGM Global strives for excellence in all endeavours and has won the loyalty of its clients — as well as a nod from the CFI.co judging panel. PGM Global, a repeat programme winner, claims the 2022 award for Best Global Portfolio Strategy Team (North America).

Aidan Garrib, Head, Global Macro Strategy and Research for PGM: "Our ability to distil the important drivers of financial markets and communicate their impact to investors has never been more important. The opportunity to provide a differentiated global portfolio strategy service motivates our team to provide custom work. Clients' investment needs have become broader and more complex, driving the need for truly global advice. By combining our services and working together, we're able to meet those demands and help them to meet their investment objectives and implementation needs."

PGM Article – Global Recognition Rewards Niche Services, Transition Management, and a Comprehensive Strategy:

https://issuu.com/cfi.co/docs/cfi.co_winter_2022-2023_online/131