



Bridgehouse Asset Managers Launches New Collaboration with Morningstar

New Relationship Will Harness Morningstar's Proprietary Research and Investment Capabilities to Provide Canadians with Core Investment Solutions at Competitive Fees

TORONTO, ON, August 11, 2016 – Bridgehouse Asset Managers (Bridgehouse), the retail trade name of Brandes Investment Partners & Co., has entered into a new retail collaboration with Morningstar Associates Inc., a unit of the Morningstar Investment Management Group, to offer core investment solutions at a fee level that provides great value to investors. The collaboration is an alliance structure designed to deliver a long-term, stable investment approach.

“Bridgehouse chose to work with Morningstar because it is well-respected and particularly known for their extensive, proprietary investment research,” says Carol Lynde, president and chief operating officer of Bridgehouse Asset Managers. “Morningstar is a mission-driven company, and our work with Bridgehouse is a great way for us to deliver on our mission of helping investors,” Scott Mackenzie, CEO of Morningstar Canada says. “As we collaborate with Bridgehouse on future investment solutions, we will draw on our extensive global resources and local expertise to meet the needs of Canadian investors and their advisors.”

“Morningstar is an excellent complement to the existing managers already on the Bridgehouse Platform,” says Lynde. The Morningstar collaboration brings to five the number of managers on the Bridgehouse Independent Platform: Morningstar Associates Inc., Lazard Asset Management (Canada), Inc., Greystone Managed Investments Inc., Sionna Investment Managers Inc. and Brandes Investment Partners, L.P.

About Bridgehouse Asset Managers

Bridgehouse Asset Managers (Bridgehouse), a trade name of Brandes Investment Partners & Co. is a Canadian independent investment platform offering products and services in alliance with investment companies with institutional roots. Bridgehouse products and services are offered through the financial advisor network to help investors take a long-term view of their individual strategies.

For more about Bridgehouse, visit bridgehousecanada.com or follow Bridgehouse on [LinkedIn](#) and [Twitter](#)

About Morningstar Research Inc. and Morningstar, Inc.

Morningstar Research Inc. is a Canadian Subsidiary of Chicago-based Morningstar, Inc., a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individual investors, financial advisors, asset managers, and retirement plan providers and sponsors. Morningstar provides data on approximately 530,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on nearly 18 million equities, indexes, futures, options, commodities, and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services through its investment advisory subsidiaries, with more than US\$185 billion in assets under advisement and management as of June 30, 2016. The company has operations in 27 countries.

About the Morningstar Investment Management Group

The Morningstar Investment Management group, through 11 investment advisory subsidiaries, creates custom investment solutions that combine award-winning research and global resources with proprietary Morningstar data. With approximately US\$185 billion in assets under advisement and management at June 30, 2016, the Morningstar Investment Management group provides comprehensive retirement, investment advisory, and portfolio management services for financial institutions, plan sponsors, and financial advisers around the world.

Morningstar Associates Inc. is a wholly owned subsidiary of Morningstar Research, Inc.

For more about Morningstar, visit: morningstar.ca

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Media Contact:

Matthew Brundage

VP Product Management

Bridgehouse Asset Managers

416 306-5748

matthew.brundage@bridgehousecananda.com