

# CI Financial Corp Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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## Abstracts

CI Financial Corp Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between CI Financial Corp and its competitors. This provides our Clients with a clear understanding of CI Financial Corp position in the Industry.

The report contains detailed information about CI Financial Corp that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for CI Financial Corp. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The CI Financial Corp financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-

term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes CI Financial Corp competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of CI Financial Corp business.

## **About CI Financial Corp**

CI Financial Corp. operates through its indirect wholly-owned subsidiaries, including CI Investments, United Financial Corporation (United), and Assante Wealth Management (Canada) Ltd. (AWM).

CI Investments is a fund management company engaged in the business of sponsoring, managing, distributing and administering investment funds in Canada. United is an investment management and wealth planning firm engaged in the businesses of managing mutual funds and providing investment counselling, portfolio management and wealth management services. United designs integrated wealth management solutions for individuals, families and businesses across Canada.

AWM's subsidiaries include financial services distribution companies engaged in the business of providing financial planning, investment advice, wealth management, estate and succession planning and insurance services.

As of December 31, 2006, CI Investments managed approximately 100 mutual funds which are sold to the public under various family names including CI Funds, CI Corporate Class, Harbour Funds, Portfolio Series, Portfolio Select Series, Signature Funds and Synergy Funds. CI Investments managed 13 closed-end investment funds,

which are also known as structured products. CI Investments also manages or administers certain segregated funds.

As of December 31, 2006, United managed 30 mutual funds which are sold to the public under the family names United Pools, Artisan Portfolios and Institutional Managed Portfolios. AWM, through its subsidiaries Assante Capital Management Ltd., Assante Financial Management Ltd., IQON Financial Inc., IQON Insurance Brokerage Inc. and Assante Estate and Insurance Services Inc., administers mutual funds, stocks, bonds, GIC's, insurance products and other investments for its clients.

## Segments

The fund operates in two segments: the Asset Management segment and Asset Administration segment.

### Asset Management Segment

The asset management segment, carried on by CI Investments and United (the Managers), offers the Managed Funds through investment dealers, mutual fund dealers, insurance advisors, and AWM, IQON and Clarica financial advisors in all jurisdictions in Canada. As of December 31, 2006, the Managed Funds consisted of approximately 200 investment funds established primarily under the laws of Ontario. The Managed Funds are sold to the public in all provinces and territories of Canada. The Fund offers Canadian investors a range of Canadian and international investment products through a network of investment dealers, mutual fund dealers, and insurance agents, which include AWM, IQON and Clarica financial advisors. In addition, United designs integrated wealth management solutions for individuals, families and businesses across Canada.

### Asset Administration Segment

The asset administration segment, carried on by AWM and its subsidiaries, offers clients in Canada a range of products and services, which encompass a multidisciplinary approach to financial planning, investment advice, wealth management, estate and succession planning and insurance services.

AWM's and its subsidiaries' primary businesses are the provision of products and services tailored to meet the specific objectives and the financial planning and financial management needs of their clients. These products and services are developed and/or

distributed through United, AWM and their subsidiaries, which include securities dealers, mutual fund dealers and life insurance agents. AWM's affiliates provide a range of products and services, including portfolio management, investment advisory services, distribution of securities (including mutual funds), insurance products and banking services and wealth management, including financial, tax and estate planning services. The markets for AWM's products and services are individuals residing in Canada.

### Significant Events

The company has launched CI Institutional Asset Management, a new division focused on the institutional investment marketplace.

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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DISCLAIMER

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2 – These sections are available only when you purchase a report with appropriate additional types of analyses.  
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## ANALYSIS FEATURES

### SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

### Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

### PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

## Key Factors Examined by PESTEL Analysis:

**Political** – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

**Economic** – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

**Sociological** – What cultural and societal aspects will work upon the demand for the business's products and operations?

**Technological** – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

**Environmental** – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

**Legal** – What laws and legislation will exert influence on the style the business is carried out?

## **IFE, EFE, IE Matrices**

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

## **Porter Five Forces Analysis**

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

## **VRIO Analysis**

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

## Reputation

### Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

## I would like to order

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