

September 21, 2026

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Weekly industry updates we're keeping an eye on—curated just for you!

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[CSA proposes simpler rules for fund repurchase deals »](#)

## Industry roundup

### OSC publishes investment management report

**What's new »** The OSC recently published its investment management division's **annual report**, highlighting how Ontario's investment management industry continues to evolve rapidly, driven by innovation, changing investor preferences, and advances in technology.

The report is a resource for investment fund managers, advisers, entities who perform services on their behalf, and other stakeholders, including investors.

**Why it matters »** The report outlines key trends and regulatory developments shaping the sector, including the growth of ETFs and alternative investments, emerging crypto asset considerations, and evolving investor needs.

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## CSA proposes simpler rules for fund repurchase deals

**What's new »** The CSA is **proposing amendments** that would make it easier for investment funds that are reporting issuers to use certain repurchase ("repo") transactions.

The goal is to help these funds access the Bank of Canada's Contingent Term Repo Facility (CTRF) and any future liquidity facilities. The proposed changes would also turn existing temporary relief into permanent rules.

The deadline to submit comments is October 21, 2026.

What the CTRF does:

- gives eligible participants short-term funding when there is severe, market-wide liquidity stress, helping investment funds meet cash needs without panic selling, and
- supports the IMF's 2025 recommendations to strengthen market liquidity and make the financial system more resilient.

**Why it matters »** By offering an alternative source of liquidity during severe market stress, the CTRF aims to reduce forced asset sales by funds and lower the risk of broader market disruption.

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## SIMA buzz

### A new digital experience

SIMA's brand new website and member portal are launching this week! This new digital experience will make it easier for you to connect, access resources, and stay informed about our work.

Stay tuned for the launch and discover what's new!

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Something big  
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# How can firms stay on top of changing advice models? Learn more at our Annual Leadership Conference!

As traditional advice models evolve to meet investor needs, the investment industry must adapt to keep up.

Hear what the experts have to say at our 2026 conference on October 29 at the Fairmont Royal York in Toronto.

Register now to learn about what firms can do to balance innovation with investor trust.

#### Featuring:

- Goshka Folda, Investor Economics (moderator)
- Adam Elliot, iA Private Wealth
- Chris Enright, CI Financial
- Stacey Petersen, Aviso

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|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
|   | <b>Goshka Folda</b><br>General Manager,<br>Investor Economics                                                    |
|   | <b>Adam Elliot</b><br>President & CEO, iA Private Wealth                                                         |
|   | <b>Chris Enright</b><br>Executive Vice President & Co-Head<br>Wealth Canada, CI Financial Corp.,<br>CI Financial |
|  | <b>Stacey Petersen</b><br>Senior Vice President, Head of Direct<br>Investing, Aviso                              |

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