

OTPP 2025 REPUTATION TRACKING AND THOUGHT LEADERSHIP

November 2025



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Methodology

A total of 1270 responses were collected among dealmakers.

“Dealmakers” are defined as employees at director-level and above in private equity/venture capital funds, investment bank/M&A firms, accounting/legal advisory firms, or working as management consultants or as managers of pension plans, sovereign wealth funds, or other alternative assets.

The number of respondents in each market are as follows:

Australia (n=100)	France (n=160)	Singapore (n=105)
Brazil (n=150)	Germany (n=150)	United Kingdom (n=150)
Canada (n=150)	India (n=155)	United States (n=150)

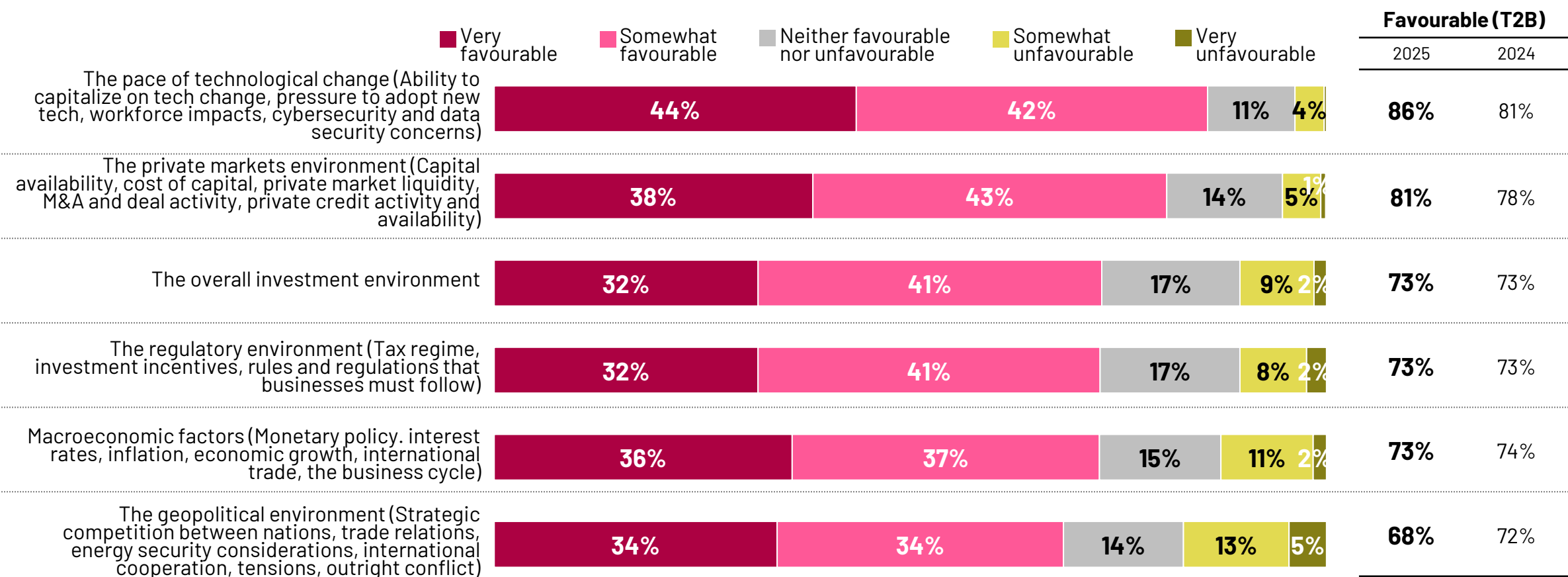
Fieldwork was carried out from Sept 2nd to October 6th, 2025.

The aggregate results for OTPP are considered accurate to within ± 3.4 percentage points, 19 times out of 20. For individual countries, the results are accurate to within ± 12 points for n=100, and ± 9.8 points for n=150.

Results are weighted to ensure consistency of aggregate sample composition year over year.

Factors Influencing Investor Outlook for 2026










Technological change and private markets are viewed as highly favourable in 2025. OTPP’s innovation focus aligns well with these factors. Geopolitical conditions remain less favourable, underscoring the importance of risk management.



Base: All respondents (n=1270)
Q7. As you look to the 2026 business environment, to what extent do you consider each of the following factors to be favourable for investors?



Factors Influencing Investor Outlook for 2026 (by Market)

% FAVOURABLE (T2B)	GLOBAL	 Australia	 Brazil	 Canada	 France	 Germany	 India	 Singapore	 UK	 USA
Pace of technological change	86%	88%	93%	83%	76%	77%	89%	87%	88%	93%
Private markets environment	81%	81%	87%	81%	67%	76%	86%	74%	86%	88%
Overall investment environment	73%	65%	82%	75%	49%	73%	82%	74%	72%	83%
Regulatory environment	73%	68%	75%	75%	51%	76%	87%	69%	69%	85%
Macroeconomic factors	73%	71%	71%	69%	63%	71%	87%	68%	74%	80%
Geopolitical environment	68%	67%	69%	71%	45%	69%	79%	71%	71%	75%










Top Factor


Base: All respondents (n=1270)

Q7. As you look to the 2026 business environment, to what extent do you consider each of the following factors to be favourable for investors?

Appetite to invest by region in 2026 (by Market)

Canada, Europe, and the USA are the top regions for increased investment in 2026. OTPP's strong positioning in Canada and global diversification align with these trends. Lower momentum in India and Latin America suggests a need for targeted strategies.










% MORE		 Australia	 Brazil	 Canada	 France	 Germany	 India	 Singapore	 UK	 USA
	GLOBAL									
Canada	47%	33%	53%	69%	39%	50%	44%	32%	55%	43%
Europe	47%, +7	43%	52%	38%	49%	51%	43%	35%	68%	39%
USA	47%	51%	63%	34%	28%	47%	43%	43%	52%	60%
China	38%, +8	39%	51%	28%	29%	49%	32%	45%	43%	25%
Asia-Pacific (excluding India and China)	36%, +3	39%	29%	29%	32%	33%	48%	62%	33%	29%
India	29%, -3	19%	17%	27%	23%	22%	73%	31%	22%	21%
Latin America	27%, -1	18%	49%	23%	22%	29%	23%	23%	27%	27%

 Top 3 Regions

Base: All respondents (n=1270)
Q6. Do you expect to invest more, less, or about the same in the following regions in 2026 versus 2025?

Business Investment Opportunities in the Energy Transition

Majority (88%) of investors globally see opportunities in the energy transition, with particularly strong agreement in India, the UK and USA. ESG leadership would position OTPP well to capture these opportunities. Lower agreement in France suggests tailoring regional strategies.

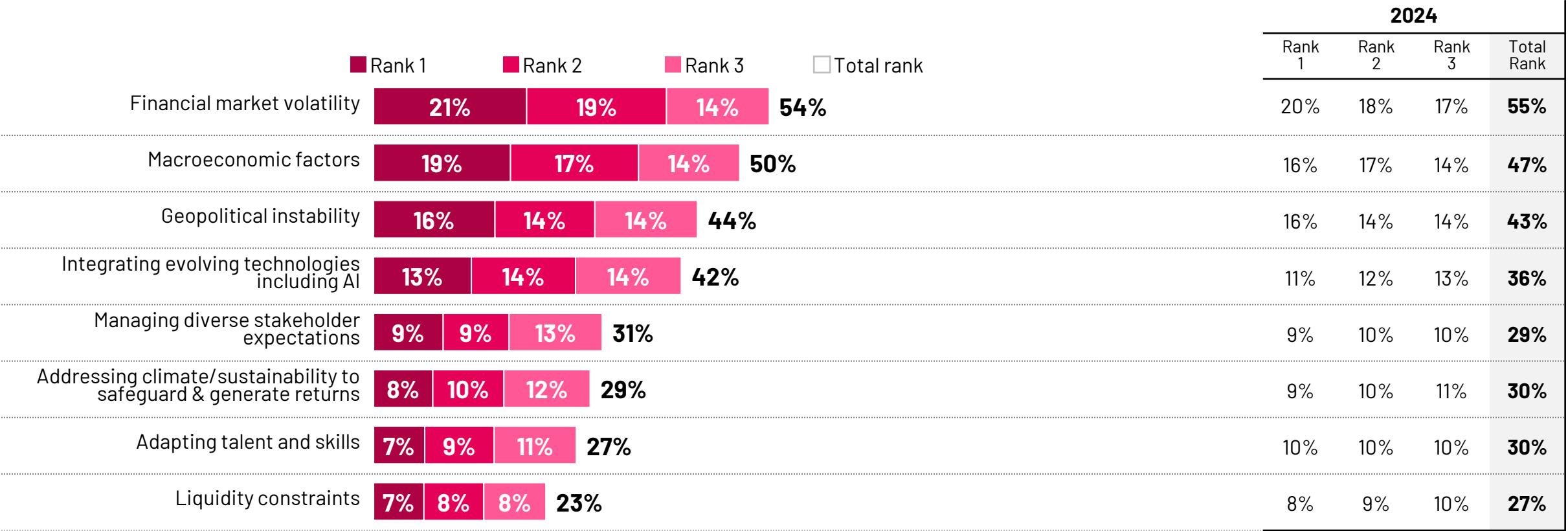
STATEMENT: I see opportunities for my business to invest in the energy transition over the next 12 months		 Australia	 Brazil	 Canada	 France	 Germany	 India	 Singapore	 UK	 USA
AGREE (T2B)	88%	86%	91%	87%	76%	88%	94%	84%	95%	94%
Strongly agree	48%	45%	54%	43%	29%	55%	59%	40%	53%	55%
Somewhat agree	40%	41%	37%	44%	47%	33%	35%	44%	42%	39%
Neither agree nor disagree	9%	12%	7%	10%	17%	10%	5%	13%	4%	4%
Somewhat disagree	1%	2%	-	1%	4%	1%	1%	1%	1%	1%
Strongly disagree	1%	-	3%	1%	3%	1%	1%	2%	1%	1%

Base: All respondents (n=1270)
Q10. How much do you agree or disagree with the following statement? I see opportunities for my business to invest in the energy transition over the next 12 months.



Top Issues for Investors

Financial market volatility, macroeconomic pressures, and geopolitical instability continue to be the largest challenges in 2025. OTPP’s reputation for stability and long-term vision directly addresses these concerns. Emphasizing resilience strategies can further strengthen investor confidence.



Base: All respondents (n=1270)
Q8. What is the largest challenge facing you as an investor today? Please rank your top 3 issues.

