

# Employer pension plans (trusteed pension funds), third quarter 2023

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Data on trustee pension funds (value of assets by sector; value of assets by foreign and domestic holdings; and revenues, expenditures and net income) are now available for the third quarter.

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### Note to readers

Starting in the first quarter of 2021, the survey was redesigned to collect additional variables and increase the number of pension funds covered quarterly.

Previously, the quarterly survey included approximately the 150 largest trustee pension funds, and the remainder of the pension amounts was imputed based on the results of the biennial Census of Trustee Pension Funds. The new design no longer uses the data from the biennial census, which was discontinued in 2016. Instead, the quarterly survey's sample has been augmented to include the top 250 trustee pension plans, equating to approximately 90% of the total value of all trustee pension assets, resulting in reduced respondent burden. Therefore, the values reported in this release refer to the 250 largest pension plans and no longer include imputation for the remainder of the trustee pension plan universe.

The new design eases data collection for respondents and data interpretability for users by reflecting the format of financial statements more closely. It also allows for higher accuracy in certain variables, such as the share of assets invested abroad. Additional detail in the reporting categories also reduces the share of assets classified in the "other assets" category.

Tables [11-10-0084-01](#), [11-10-0085-01](#) and [11-10-0086-01](#) have replaced tables [11-10-0076-01](#), [11-10-0077-01](#) and [11-10-0079-01](#), which are now terminated and have been archived.

For the purposes of this survey, trustee pension funds include the assets of one or more registered pension plans: those held under a trust agreement, those held by a pension corporation or pension fund society, those administered under legislation by the Government of Canada or the government of a province of Canada, and those held by an insurance company for investment management only.

Data on revenues and expenditures for pension funds routinely exhibit seasonal characteristics. Readers should, therefore, view quarterly changes with some caution.

Pension funds held in total under an annuity insurance contract are excluded from the survey.

The data are subject to revisions for a period of 18 months from initial release.

**Available tables:** [11-10-0084-01](#) to [11-10-0086-01](#) .

**Definitions, data sources and methods:** survey number [2607](#).

The [Income, pensions, spending and wealth](#) portal, which is accessible from the *Subjects* module of the Statistics Canada website, provides users with a single point of access to a wide variety of information related to revenue, pensions, spending and wealth.

For more information, or to enquire about the concepts, methods or data quality of this release, contact us (toll-free 1-800-263-1136; 514-283-8300; [infostats@statcan.gc.ca](mailto:infostats@statcan.gc.ca)) or Media Relations ([statcan.mediahotline-ligneinformedias.statcan@statcan.gc.ca](mailto:statcan.mediahotline-ligneinformedias.statcan@statcan.gc.ca)).