

# Press & Media Resources

## Media Kit

### Overview




Founded in 1979, Middlefield is a Toronto-based asset manager specializing in innovative investment solutions. Over the past 45 years, we have developed a disciplined investment process across six core equity income mandates: Real Estate, Healthcare, Innovation, Infrastructure, Energy, and Diversified Income. We focus on high-quality companies with competitive cash flow and dividend growth potential.

Our investment solutions include award-winning ETFs and Mutual Funds, designed to meet the needs of advisors, institutional investors, and individual investors. Backed by a dedicated team, we strive to deliver superior returns through expertise and disciplined portfolio management.



### Dean Orrico, President & CEO


Dean Orrico joined Middlefield in 1996 and brings over 25 years of investment experience to his role as president and CEO. He is responsible for overseeing the business management and expansion of the firm's asset management business in Canada and abroad. He is also the lead manager of Middlefield's real estate and London Stock Exchange-listed funds. Dean graduated with a Bachelor of Commerce from the Rotman School of Management at the University of Toronto and holds an MBA from the Schulich School of Business at York University. Dean is regularly invited to speak at investment seminars and is frequently interviewed in Canada and in the UK for his insights on the market.

Key Focus Area	Media Availability	Recent Appearance
Global Real Estate Macro Trends Geopolitics & Current Events	  	Globe: Why real estate whiz Dean Orrico is bullish on Canadian REITs Globe: Six bargain REIT picks poised for a recovery Citywire: Why Dividend-Rich Canada is About to Deliver January 2025 Market Commentary: Real Estate



### Robert Lauzon, Managing Director & CIO




Rob Lauzon has been with Middlefield since 2002. He is chief investment officer and lead manager on a number of investment funds, including Income Plus, Middlefield's North American flagship fund. Rob holds an Honours Bachelor of Business Administration from Wilfrid Laurier University, an MBA from the Rotman School of Management at the University of Toronto and the Chartered Financial Analyst designation. Rob is a regular commentator on BNN Bloomberg and frequently contributes to Canada's national newspapers.

Key Focus Area	Media Availability	Recent Appearance
North American Equities Commodities Infrastructure	  	FP: 10 stocks to watch in 2025 BNN Bloomberg: Rob Lauzon's 2024 oil outlook January 2025 Market Commentary: Infrastructure



### Dennis da Silva, Senior Portfolio Manager




Dennis da Silva has been the lead manager for Middlefield's MRF Flow-Through Funds for over 20 years and covers the metals, mining and agriculture sectors with over 25 years of experience in the natural resource market. He has developed strong relationships with a vast number of Canadian energy companies and is regularly interviewed by the media for his outlook on the markets or perspective on individual issuers. He is an MBA graduate of the Schulich School of Business at York University.

Key Focus Area	Media Availability	Recent Appearance
Resource Sector Energy & Mining	  	FBNN Bloomberg's Market Call: Dennis da Silva – March 4, 2024 January 2025 Market Commentary: Resources



### Shane Obata, Portfolio Manager




Shane Obata is a portfolio manager at Middlefield and is responsible for covering global equities across Middlefield's funds. Prior to joining Middlefield in 2018, he was with Richardson GMP's asset management team. He holds the Chartered Financial Analyst designation and a Master of Finance from Wilfrid Laurier University, where he was awarded the gold medal of academic excellence. Shane offers a unique investment approach which combines fundamental analysis and quantitative finance.

Key Focus Area	Media Availability	Recent Appearance
Global Dividends Technology & Artificial Intelligence	  	Globe: Why this money manager is buying Broadcom, Blackstone and more BNN Bloomberg: Shane Obata's Tech Market Analysis January 2025 Market Commentary: Technology & Communications



### Robert Moffat, Portfolio Manager

Rob Moffat is a portfolio manager at Middlefield and is responsible for covering global equities with a focus on Real Estate and Healthcare. Prior to joining the company in 2017, he held a research position with a wealth management team at Richardson GMP in Calgary. Rob holds a Bachelor of Management and Organizational Studies degree with a specialization in Finance from Western University and holds the Chartered Financial Analyst designation.

Key Focus Area	Media Availability	Recent Appearance
Healthcare Real Estate	  	WP: Investing in the future of healthcare BNN Bloomberg: Rob Moffat's Top Biotech Picks January 2025 Market Commentary: Healthcare

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