


Sagard's Distinctive Edge: Co-Founder & Vice Chairman Samuel Robinson on Niche-Focused Growth, Global Partnerships, and Innovation Across Asset Classes



Samuel Robinson, Co-Founder and Vice Chairman of Sagard, presents a clear and distinctive vision for the firm in the world of alternative asset management. Sagard, a Canada-based firm managing \$27 billion in assets, was established in 2016 but draws on an investment heritage stretching back over two decades. Today, it operates across four major asset classes—private equity, private credit, venture capital, and real estate—each within carefully chosen niches that align with Sagard's commitment to focused, strategic investing. The firm prides itself on its entrepreneurial ethos, a quality Robinson emphasizes as a bridge to the entrepreneurial clients and management teams they support. Backed by the Canadian Desmarais family and boasting a roster of globally recognized partners, Sagard aims to balance innovation and rigorous discipline across its investments. As Robinson shares in an interview with Hubbis, this approach resonates well with Sagard's diverse investor base, from pension funds and family offices to global insurers, each of whom is drawn to Sagard's differentiated strategies and commitment to high performance.

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SAMUEL ROBINSON

*Co-Founder and Vice Chairman
Sagard*

Robinson begins by presenting a vision that sets Sagard apart in a crowded alternative asset landscape. With roots in Canada, Sagard, under Paul Desmarais III's leadership, has strategically positioned itself as an alternative asset manager with highly differentiated investment strategies, managing \$27 billion across private equity, private credit, venture capital, and real estate. Sagard is as much about specialization as it is about creating meaningful, high-value partnerships with investors and entrepreneurs—a philosophy Robinson conveys with clarity.

"Our approach to alternative assets is straightforward: identify and cultivate niches where we can deliver real value and expertise," Robinson states. "We know we're competing with firms that are far larger, but Sagard has carved out a space by building around defined investment themes where we know we can make a difference." Each of Sagard's strategies is rooted in an entrepreneurial, growth-oriented mindset, from their work with

fintech innovators to strategic investments in private credit for middle-market companies.

Strategic Focus on Venture Capital

Venture capital is one of Sagard's keystone strategies, where they have become a leader in the fintech space—a sector Robinson is personally passionate about. "Our venture strategy is built on the intersection of financial services and technology, a space we recognized early on," he says. Over three venture funds, Sagard has consistently

I INTO THE FUTURE

Robinson envisions a future shaped by consolidation, distinction, and broader market accessibility. "Talking with a friend in Hong Kong recently, we agreed that throughout our decades in financial services, consolidation and fee compression have been constants. They'll continue reshaping the landscape," he reflects. Robinson foresees a market dominated by a few giants while smaller, boutique firms succeed by delivering unique, specialized value. "There's room for boutiques that don't need a trillion dollars in AUM to thrive, but they'll need to stand out and perform well. Whether we become a giant or not, Sagard's aim is to be distinctly different and to deliver something no one else can," he explains.

Robinson also anticipates significant expansion in client access. Alternative asset management, once exclusive to pensions, insurance, and ultra-wealthy clients, is now open to a broader range of investors. "The opportunity lies in expanding access while maintaining integrity," he notes, highlighting the importance of treating all investors with respect. "There's always been a temptation in this industry to overlook or – worse – pass along assets to the 'little guy,' but if you can avoid that, there's enormous potential for profitable, responsible growth that delivers value to clients."

supported companies at various stages, from early seeds through Series B/C, building a roster of disruptors across consumer and SMB finance, payments, insurance, and asset management. Sagard's commitment to fintech is not merely about capital but about creating a platform that fintech companies turn to for long-term growth, fueled by expertise and access to a global network.

"We're currently focused on our fourth venture fund," Robinson notes. "We want to continue building a high-growth portfolio of fintech companies, where

we invest alongside founders who see us as a partner. This approach enables Sagard to offer investors exposure to early-stage financial innovators, a value proposition that few other firms provide in such a focused way.”

Private Equity with a Local Expertise Edge

Sagard’s private equity approach is distinctive in both focus and execution, emphasizing geographical knowledge and management quality, primarily in Europe. Through Sagard MidCap, Sagard invests in middle-market companies principally within French-speaking Europe, a region where they have established strong relationships and deep expertise. “Our team in Paris has established relationships with numerous key management teams in the region,” Robinson explains, “which allows us to help scale businesses through acquisitions and other growth strategies. These companies may be modest in size at inception, but they hold significant potential for expansion, which is why we have seen strong investment performance over multiple vintages.”

Sagard NewGen complements MidCap with a focus on technology and healthcare companies in the lower middle-market, reflecting

Technology, particularly AI, is another transformative factor Robinson sees impacting the industry. “We brought in our first AI thought leader this year, and her insights have already started reshaping our strategy and approach,” he says. While the full effect of AI on investment processes remains unknown, Robinson is certain that those not integrating advanced technology risk falling behind. AI, he believes, will also raise the stakes for human talent: “If you thought people had to be good at their jobs now, they’re going to have to be exceptional in the AI-driven future.” Sagard’s focus on human capital—attracting and retaining the best talent—continues to be central to its long-term vision.

their understanding that success here requires a clear niche and sectoral focus rather than broad-based market participation.

Innovative Approaches to Private Credit

Sagard’s private credit division offers another point of distinction: a focus on direct lending to founder-led and smaller public companies, often those that banks overlook. “We’re targeting a segment that needs flexible, relationship-driven financing solutions,” Robinson states. “This allows us to negotiate terms and work closely with management teams.” Sagard’s credit strategy spans two core offerings: an opportunistic

fund with a high return target and a more conservative senior lending product.

Backed by a Network of Trusted Partners

A defining advantage for Sagard is the robust support of its shareholders and institutional partners. Beyond the Desmarais family-controlled Power Corporation, Sagard benefits from key backers like Lunate, the Abu Dhabi-based sovereign fund, and Great-West Life, Canada’s largest insurer, which invests across Sagard’s products. In addition, the Bank of Montreal (BMO) contributes both capital and a distribution partnership,

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reflecting Sagard's appeal across diverse investor profiles.

Exploring Asian Horizons

While Sagard's core operations are North American and European, Robinson is enthusiastic about Sagard's growing opportunity in Asia. "There's a real sense of urgency and sophistication here," he remarks. With deep experience in Asian markets from his prior roles, Robinson is well-positioned to connect Sagard with local opportunities. "The rapid pace and high level of sophistication in Asia make it a crucial market for engagement. We want to building real partnerships, both with investors and potential local investment partners." For Sagard, Asia represents not only a source of capital but also a potential opportunity for deploying capital in high-growth markets, where the firm's niche expertise and partnership model can thrive.

Creating Access for Investors

Robinson also highlights Sagard's role in offering curated access to leading managers in both private equity and venture capital through Performance Equity Management (PEM). Robinson explains, "You could try meeting 20 private

I KEY PRIORITIES

The first priority for Sagard is firmly on capital expansion and market accessibility. For Robinson, capital growth is more than a strategic move—it's essential for both the firm's stability and retaining its talent. "Attracting capital keeps us agile and enables us to retain the brightest minds," he says. To this end, Sagard is pushing boundaries with its first retail-focused credit products in Canada, extending access to individual accredited investors. This shift not only diversifies Sagard's investor base but makes traditionally exclusive private credit products available to a broader audience.

Secondly, acquisitions are a key component of Sagard's growth plan. Following the acquisition of Performance Equity Management, a well-regarded fund allocation business, Sagard is actively seeking additional opportunities. Robinson notes that Performance Equity Management will enable Sagard's reach into secondary markets, a growth area expected to play a significant role in the firm's continued expansion. While discussions are ongoing, Robinson remains clear: "Strategic acquisitions have allowed us to diversify and strengthen our capabilities."

Finally, consistent investment performance remains central to Sagard's mission. As Robinson puts it, "No performance, no license to operate." Sagard's commitment to performance is unyielding, and it's what keeps investors—and top talent—loyal.

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equity firms to assess them, but to realistically build a portfolio, let alone add meaningful co-investments, would take years. In venture capital, it can be nearly impossible just to obtain access to the leading funds. PEM's decades-long relationships provide our clients with direct access and a strong history of performance."

In closing, Robinson underscores that Sagard's success is driven by its commitment to both distinct value propositions and long-term client relationships. By strategically differentiating each of its offerings, Sagard ensures investors benefit from niche expertise across asset classes—whether they're looking for venture exposure in fintech, tailored credit opportunities, or growth-driven private equity in Europe. Through a focus on entrepreneurial spirit, rigorous discipline, and a collaborative ethos, Sagard remains a compelling partner for investors worldwide. ■



GETTING PERSONAL WITH SAMUEL ROBINSON

Robinson offers a fascinating journey that began in the historic towns of Yorkshire, UK. Born in Bradford and raised in Scarborough, Robinson attended Pocklington School before moving on to Oxford, where he initially studied English. "It's hard to believe now, but at the time, English was one of the hardest subjects to get into at Oxford," he recalls. Despite shifts in popularity for the subject, Robinson values the foundation English provided, shaping a critical perspective and understanding of people that has been essential in his career. His academic path took an unexpected turn with a master's in Arabic and Middle Eastern Studies, which led him to live in Damascus in the mid-90s. There, fully immersed in the culture and language, Robinson experienced firsthand the complexities of a region that, to this day, remains a global focal point.

Robinson's career highlights before Sagard center on nearly two decades with Goldman Sachs, where he sought variety over routine. "Whenever I had a choice between continuity and adventure, I chose adventure," he shares. His journey at Goldman was marked by high-level exposure early on, working

closely with figures like Malcolm Turnbull, future Prime Minister of Australia, and Mike Evans, former chairman for Asia. Whether meeting with the Governor of the People's Bank of China, connecting with tech founders in Bangalore, or navigating a joint venture in Australia, as Evans' chief of staff Robinson gained insights into the rapid evolution of Asia's financial landscape. "The sheer complexity and pace of what was happening in Asia was staggering," he says, grateful for the lasting influence these experiences had on him.

Robinson relocated to Australia in 1999, just in time for the Sydney Olympics, then transferred to New York, Hong Kong and ultimately back to New York. Personally, Robinson is married to Liz, also a Goldman Sachs veteran, and they have two children: a 20-year-old daughter aiming to become a teacher, and a 13-year-old son with a fervent hope for Nottingham Forest to win every match this season.

Outside of work, Robinson's pursuits reflect his drive and curiosity. Recently, he was drawn into "Rovember," a rowing challenge led by a Navy SEAL in his network. "He told me I looked like I should row, and now I'm in it every November," he laughs. He's also a dedicated runner, cyclist, and clay shooter, finding these hobbies a welcome balance to his intense professional life. His connection to Asia endures, particularly through his involvement with the Cambodia Children's Fund, an organization he supports as chair of their endowment. Over two decades, the organization has uplifted thousands of children from poverty, with some achieving advanced degrees abroad. "Watching the transformation of these kids through education, healthcare and food – things all should have but many do not - is one of the most rewarding things I've been part of," Robinson says.

On the question of why he continues to work when he arguably doesn't have to, Robinson's answer circles back to his entrepreneurial spirit. "There's something incredibly fulfilling about building something and seeing people grow within that structure," he reflects. He treasures moments where "someone who was hired by someone you hired does something brilliant you'd never have thought of." Interacting with global financial leaders, he adds, keeps him both challenged and inspired. "Last week in Hong Kong, I was surrounded by people managing hundreds of billions in assets. Getting to ask them questions and hear their insights doesn't feel like work. It's a privilege."

When asked about advice for young professionals, Robinson emphasizes the importance of surrounding oneself with inspiring mentors. He credits his own trajectory to working with influential figures early on. "Nothing is more valuable than learning from people who are not only good at what they do but willing to share and teach," he notes. He also advises gaining experience in growth-focused or entrepreneurial environments. In his words, "Being in Asia when everything was about growing the pie, rather than fighting for a slice, taught me the value of expansion and opportunity." Lastly, he acknowledges that timing and luck play a role: "Sometimes, it's about being in the right place when the tide comes in. Asia and alternative assets are both exciting spaces that continue to grow."

In Robinson's world, it's clear that both work and life are driven by a relentless curiosity, a commitment to learning, and a desire to make a meaningful impact—whether through Sagard, his family, or his dedication to causes that resonate.