

Asset mix	Region	Sustainable investing strategy
<b>Equities, balanced</b>	<b>Global, Canada</b>	<b>Sustainable core</b>

# Mackenzie Betterworld Team

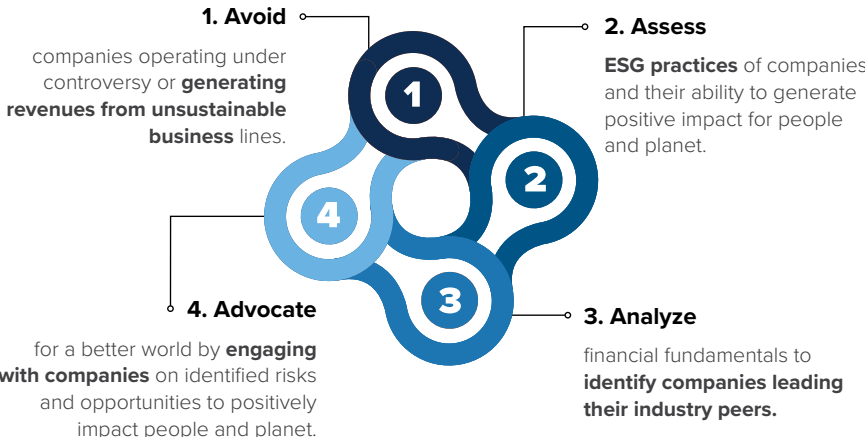
We strive to invest in companies that are making a positive impact on people and the planet

We are a core portfolio management team that incorporates propriety ESG analysis with fundamental analysis, and proactive stewardship to identify growth opportunities and mitigate risk.

Our proprietary process combines negative and positive screening with the goal of avoiding unsustainable or controversial businesses, and favours companies that contribute to the United Nations Sustainable Development Goals. Our Canadian and global portfolios restrict exposure to fossil fuels<sup>1</sup>, which are significant contributors to global warming and greenhouse gas emissions.<sup>2</sup>

Led by Andrew Simpson, who has managed sustainable investing mandates since 2010, the Mackenzie Betterworld Team brings decades of leading ESG expertise along with proven results. Andrew has over 20 years of analytical and portfolio manager experience leading both Canadian and global mandates.

### Our proprietary four As investment process leads with ESG



### OUR APPROACH

**Combining propriety ESG research with fundamental analysis**

We believe that companies with strong sustainability characteristics and attractive fundamentals can outperform over a market cycle.

**Core equity with purpose**

Diversified, large-cap equity portfolios focused on sustainable business models.

**Active ownership**

Proactive engagement on material ESG issues encourages good companies to become even better.

### Mandates

- Mackenzie Betterworld Global Equity Fund
- Mackenzie Betterworld Canadian Equity Fund

### Components

- Mackenzie Global Sustainable Balanced Fund

## Combining proprietary ESG research with fundamental analysis

At Mackenzie Betterworld, we lead with enhanced ESG analysis followed by comprehensive financial analysis.

Our priority is to rule out companies with poor ESG performance, then identify companies with the ability to generate positive impact on people and the environment through progressive ESG practices and behaviours.

We don't rely on ESG ratings or scores from third parties. We conduct original research using our own proven, proprietary process to uncover and evaluate opportunities that meet our ESG standards and financial criteria metrics.

With Mackenzie Betterworld, investors benefit from the team's independent investment methodology backed by the strength of Mackenzie.

## Core equity with purpose

Diversified, large-cap equity portfolios with a long-term focus.

Investor surveys in recent years suggest a growing number of Canadians want to invest responsibly, with purpose. That's why our funds are designed as core holdings. Our Canadian and global portfolios are comprised mainly of large-cap equities that are well diversified across sectors and regions. Managed in a growth style, undergoing rigorous ESG and fundamental analysis, our funds are designed to deliver competitive returns while mitigating risk. We believe sustainability is a long-term strategy that can play a role in any portfolio.

## Active ownership

We believe that a company has a responsibility to all its stakeholders, not just its shareholders.

In our view, companies that can successfully balance the interests of stakeholders can better manage risks, capture opportunities and ultimately, better align to a sustainable future.

Active ownership is an important part of our process. As stewards of capital, we have a responsibility to engage with companies to maintain a dialogue on managing material ESG risks and delivering positive impact to their stakeholders.

## Why Mackenzie

Our mission is to create a more invested world together, so that all Canadians can be better off.

## Invested in the future, together

We build unshakeable relationships with advisors to help investors reach their potential through a broad range of innovative investment solutions for all investor needs. We're committed to investing in a responsible, sustainable future, while making investments easier to understand.

## Specialist expertise and solutions

Mackenzie offers a choice of multiple investment boutiques — specialist teams that pursue distinct strategies and opportunities.

## Backed by strength

Part of IGM Financial and the Power Financial Group of Companies, trusted advice champions. IGM Financial has \$270.4B (CAD) in assets under management and advisement (AUM&A) as of December 31, 2024.

## The Mackenzie Betterworld Team



### Andrew Simpson, CFA

Senior Vice President, Portfolio Manager, Head of Team

Joined Mackenzie in 2021

Investment experience since 1997

- Andrew is a seasoned investment leader with over 20 years of analytical and portfolio management experience, both in Canada and abroad.
- Managed sustainable investing mandates since 2010.
- Led a successful team in Canadian and global ESG mandates.



### Stan Li, CFA, CPA, CGA

Director, Investment Research

Joined Mackenzie in 2021

Investment experience since 2013

- Stan is responsible for the investment research, covering consumer discretionary, consumer staples, industrials, technology and utilities sectors.
- He brings over 10 years of financial industry experience with a focus on financial reporting, performance measurement and financial modelling.



### Jonas Cuypers, CFA

Director, Investment Research

Joined Mackenzie in 2020

Investment experience since 2012

- Jonas is responsible for the investment research, covering communication services, financials, health care, materials and real estate sectors.
- Prior to joining the team, Jonas led ESG research for the Mackenzie Investments Sustainability Centre of Excellence including the firmwide climate action strategy as a net zero asset manager.

## Fund codes and management fees

Fund name	Series	Prefix	FE	BE**	LL3**	Mgmt fee	MER*
Mackenzie Betterworld Global Equity Fund	A	MFC	8331	8332	8333	2.00%	2.55%
	F	MFC	8336	-	-	0.80%	1.06%
	PW	MFC	8342	-	-	1.80%	2.14%
Mackenzie Betterworld Canadian Equity Fund	A	MFC	8357	8358	8359	2.00%	2.50%
	F	MFC	8362	-	-	0.75%	0.98%
	PW	MFC	8368	-	-	1.75%	2.07%
Mackenzie Global Sustainable Balanced Fund	A	MFC	5256	5257	5258	1.85%	2.34%
	F	MFC	5260	-	-	0.70%	0.94%
	PW	MFC	6997	-	-	1.70%	2.04%

\* MER as of September 30, 2024.

\*\*Effective June 1, 2022, the redemption charge purchase option, and the low-load purchase option are no longer available for purchase, including those made through systematic purchase plans such as pre-authorized contribution plans. Switching from securities of a Mackenzie Fund previously purchased under the redemption charge or low load purchase options to securities of another Mackenzie Fund, under the same purchase option, will continue to be available until such redemption schedules expire.

### For more information about the **Mackenzie Betterworld Team**, please contact your financial advisor.

<sup>1</sup> All Betterworld portfolios exclude companies that derive at least 10% of their revenues from: thermal coal, oil sands, shale energy, arctic oil and gas.

<sup>2</sup> Source: The UN Climate Action report <https://www.un.org/en/climatechange/science/causes-effects-climate-change>

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

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