

# We're making Canada a better place, one investment at a time.

Time to read: 10 min

In the past year, the pandemic, climate change, and racial inequities have exposed some of the world's biggest challenges. More and more Canadians are questioning how their investment choices can address these challenges and make the world a safer, fairer and more sustainable place for themselves and future generations.

In 2020, sustainable investments in Canada rose to

**\$20  
BILLION**

**+55%  
IN 1 YEAR**

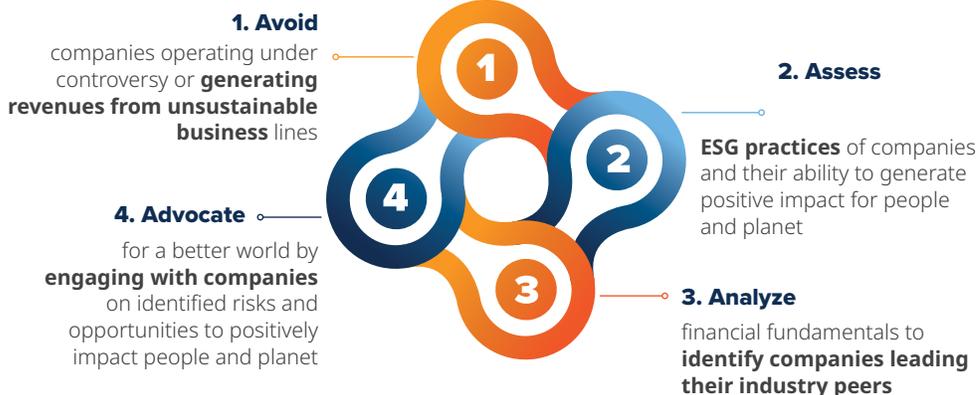
Source: IFIC

## Introducing Mackenzie Betterworld Canadian Equity Fund: An ESG-led portfolio making an impact close to home.

At Mackenzie Betterworld, ESG drives portfolio construction. Our first priority is identifying Canadian companies that are making a positive impact on people and the planet.

First, we apply rigorous ESG analysis and then fundamental, bottom-up stock selection, so you can invest with a clear conscience while getting competitive return potential. And we don't stop there. Ongoing advocacy and pro-active engagement with companies help to advance sustainability into the future.

Our proprietary 4 A's investment process leads with ESG.



### The Mackenzie Plus

- + We put ESG first**  
Original, independent ESG analysis followed by robust financial analysis
- + Experienced team**  
with a proven, proprietary process backed by Mackenzie
- + Core equity with purpose**  
Diversified, large-cap equity portfolios focused on long-term value

## Managed by

### Mackenzie Betterworld team

Mackenzie Betterworld Canadian Equity Fund seeks to provide long-term capital appreciation by investing primarily in equity securities of companies located anywhere in the world that have progressive environmental, social and governance (ESG) practices.

#### Andrew Simpson, CFA

Team Lead, Senior Vice President,  
Portfolio Manager

Andrew is a seasoned investment leader with more than 20 years of analytical and portfolio management experience, both in Canada and abroad. He has managed sustainable investing mandates for over 10 years and led a successful team in Canadian and Global ESG mandates.

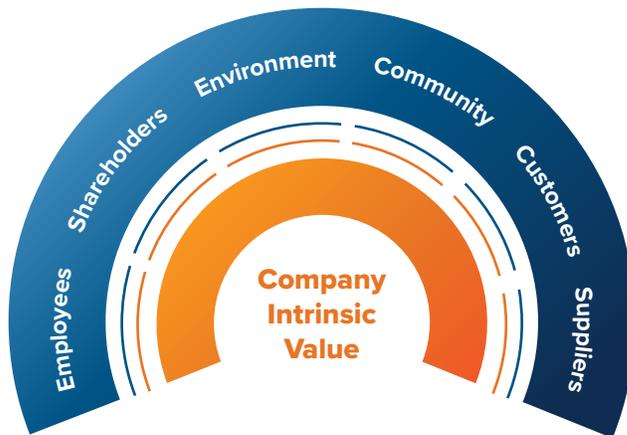
### Original, independent ESG research.

Some portfolio managers rely solely on ESG research and scoring from outside sources. That's not the Betterworld way. We do original research using our own proprietary process to uncover and evaluate opportunities that meet our ESG standards and financial criteria.

### We look beyond the balance sheet.

We believe that a company has a responsibility to all of its stakeholders, not just its shareholders. We assess corporate impact on employees, customers, suppliers, the community and the environment.

Betterworld views a company's value through a broad stakeholder lens.



### Mackenzie Betterworld: A new name, an experienced team.

Mackenzie Betterworld is a new name in ESG, but our team has decades of ESG experience, and a track record of success. The team is led by Andrew Simpson, who has managed sustainable investing mandates for over 10 years. His track record includes successful performance in Canadian and Global ESG mandates.

### A core Canadian equity strategy with competitive growth potential.

Mackenzie Betterworld Canadian Equity Fund is comprised mainly of large-cap equities that are well diversified across sectors and industries. Managed in a growth style, the fund also adds return potential by overweighting small-mid caps. With rigorous ESG and fundamental analysis, the fund is designed to deliver competitive returns with less downside. We believe that sustainability is a long-term strategy that can play a role in any portfolio.

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**With both negative and positive ESG screens, the fund avoids unsustainable or controversial businesses and favours companies that support the UN Sustainable Development Goals.**

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### Fund codes and management fees

Series	Prefix	FE	BE	C\$		Mgmt Fee %
				LL2	LL3	
LB	MFC	9396	–	–	–	2.00%
LF	MFC	9397	–	–	–	0.75%
LF5	MFC	9374	–	–	–	0.75%
LW	MFC	9398	–	–	–	1.75%
LW5	MFC	9375	–	–	–	1.75%
LX	MFC	9376	–	–	–	2.00%

### Fund series descriptions:

**Series LB** – Bundled series that is available in front-end purchase option.

**Series LF** – A Fee-based series where the advisory fee is charged separately from management fee. Your dealer has entered into an agreement with Mackenzie Investments relating to the distribution of these units. Available with private banking only.

**Series LW** – Investors are automatically enrolled to series LW once \$100,000 of household assets with LBCFS from Series LB is reached.

**Series LX** – Series with monthly distributions (\$5,000 minimum).

Additional fund series available at [mackenzieinvestments.com/fundcodes](http://mackenzieinvestments.com/fundcodes)

Commissions, trailing commissions, management fees, and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns as of July 31, 2020, including changes in unit value and reinvestment of all dividends and does not take into account sales, redemption, distribution, or optional charges or income taxes payable by any security holder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

The content of this brochure (including facts, views, opinions, recommendations, descriptions of or references to, products or securities) is not to be used or construed as investment advice, as an offer to sell or the solicitation of an offer to buy, or an endorsement, recommendation or sponsorship of any entity or security cited. Although we endeavour to ensure its accuracy and completeness, we assume no responsibility for any reliance upon it. Index performance does not include the impact of fees, commissions, and expenses that would be payable by investors in the investment products that seek to track an index.

Mutual funds are distributed by LBC Financial Services Inc. (“LBCFS”), a subsidiary of Laurentian Bank of Canada (“Laurentian Bank”). Mutual funds offered by LBCFS are part of the Laurentian Bank Group of Funds managed by Mackenzie Investments. LBCFS is a corporate entity separate from the Laurentian Bank and from Mackenzie Investments.

The registered LBCFS representative is also a Laurentian Bank employee. Accordingly, LBCFS’s accountability is limited to the conduct of its representatives in the performance of their duties for LBCFS.

Important information is contained in the relevant Fund Facts and in the Simplified Prospectus. We ask that you read this (these) document(s) carefully prior to investing. To obtain your copy of the Fund Facts concerning the fund(s) you have chosen, please contact a LBCFS representative at the Laurentian Bank branch.

Commissions, trailing commissions, management fees and other expenses all may be associated with mutual fund investments. Nothing guarantees that the fund will maintain its net asset value per unit at a constant amount or that the full amount of your investment in the fund will be returned to you. Mutual fund values change frequently and past performance may not be repeated.

## 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 17 investment boutiques—specialist teams that pursue distinct strategies and opportunities.

## Backed by strength

One of Canada’s largest asset managers, Mackenzie is part of IGM Financial and the Power Financial Group of Companies, trusted advice champions with over C\$1,423 billion in assets. (30/06/21)



Speak to your  
LBC Financial Services  
Representative  
to learn more about  
**Mackenzie Betterworld  
Canadian Equity Fund.**