

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

*Time to read: 10 min*

At Mackenzie Betterworld, we invest in companies that are making a positive impact on people and the planet. Our Canadian and global portfolios combine rigorous ESG analysis with fundamental, bottom-up stock selection, so you can invest with a clear conscience while earning competitive returns.

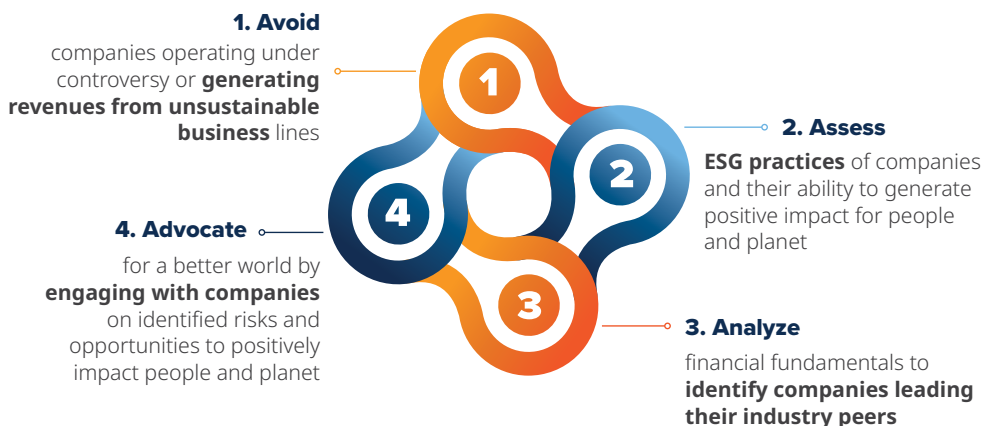
And we don't stop there. Ongoing advocacy and pro-active engagement with companies help to advance sustainability into the future.

## Mackenzie Betterworld: A new name in ESG, backed by decades of experience.

Mackenzie Betterworld brings together decades of ESG expertise in an accomplished team that has a prior track record of success. Their proprietary process helps them to identify companies with growth potential that are aligned to the United Nations Sustainable Development Goals.

The team is led by Andrew Simpson, who has managed sustainable investing mandates for over 10 years, and led successful Canadian and Global ESG mandates.

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



### The Mackenzie Plus

- + We put ESG first**  
We lead with ESG analysis and then conduct financial analysis
- + Core equity with purpose**  
Diversified, large-cap equity portfolios focused on long-term value
- + No outsourcing**  
Original, independent ESG research using a proprietary process

#### MANDATES

Mackenzie Betterworld  
Canadian Equity Fund

Mackenzie Betterworld  
Global Equity Fund

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



## We put ESG first.

*At Mackenzie Betterworld, ESG is a promise, not a compromise.*

At Mackenzie Betterworld, we lead with ESG analysis and then conduct financial analysis. Our first priority is to rule out companies with poor ESG performance, and then to identify companies with the ability to generate positive impact on people and planet through progressive ESG practices and behaviours.

In our industry, it is common for ESG to take a back seat. Not so at Betterworld. Here, ESG comes first, and it's embedded in everything we do.

## Core equity with purpose.

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

We all know that a rapidly growing number of Canadians want to invest responsibly, with purpose. That's why Betterworld funds are designed as core holdings, not niche funds.

Our Canadian and global portfolios are comprised mainly of large-cap equities that are well diversified across sectors and industries. Managed in a growth style undergoing rigorous ESG and fundamental analysis, our funds are designed to deliver competitive returns with less downside. We believe sustainability is a long-term strategy that can play a role in any portfolio.

## We don't outsource. We are the source.

*Original, independent ESG research using a proprietary process.*

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

With Betterworld, you get independent thinking backed by the strength of Mackenzie. Canadian-owned, we believe there's no better place to start a better world than right here at home.

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**“ESG is the first thing we consider. It’s not an overlay or an afterthought. It’s not a step. It’s a continuous priority. ESG drives portfolio construction.”**

—Andrew Simpson, Lead,  
Mackenzie Betterworld Team

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## The Betterworld Team



**Lead: Andrew Simpson, CFA**  
Team Lead, SVP & Portfolio Manager

Joined in 2021; investment experience since 1997

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



**Stan Li, CFA, CPA, CGA**  
Director, Investment Research

Joined in 2021; investment experience since 2013

- Stan brings over 8 years of experience focused on financial reporting, performance measurement and financial modelling.
- CPA with detailed knowledge of corporate profitability and risk management.
- Bachelor's degree in accounting and finance from Simon Fraser University.



**Shelly Dhawan, BA, RIS**  
Director, ESG Research

Joined in 2021; investment experience since 2011

- Shelly brings over 10 years of experience in ESG integration and corporate ethical risk analysis.
- Led ESG teams in research, analysis and company engagement in Canadian and Global ESG mandates.
- B.A. in psychology and commerce from the University of British Columbia and Responsible Investment Specialist (RIS) designation from RIA Canada.



**David Frazer, MA**  
Director, ESG Research

Joined in 2021; investment experience since 2011

- David brings over 10 years of experience in ESG research and engagement.
- Led engagement teams in the IT, pharmaceutical and banking industries.
- M.A. in international economics from Johns Hopkins University SAIS.

Betterworld Mandates	Series	Prefix	FE	BE	LL2	LL3	Mgmt Fee
Betterworld Canadian Equity Fund	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%
Betterworld Global Equity Fund	LB	MFC	9393	–	–	–	2.00%
	LF	MFC	9394	–	–	–	0.80%
	LF5	MFC	9371	–	–	–	0.80%
	LW	MFC	9395	–	–	–	1.80%
	LW5	MFC	9372	–	–	–	1.80%
	LX	MFC	9373	–	–	–	2.00%

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.

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)



For more information about the **Mackenzie Betterworld Team**, please contact your **LBC Financial Services Representative**.