

Style

**Sustainable  
Core**

Risk

**Medium**

Asset Mix

**Equities**

Region

**Canada**

# 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**

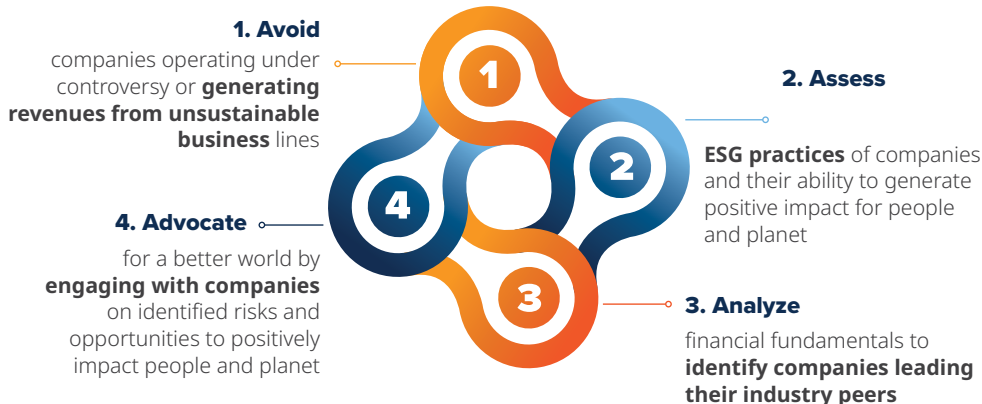
Source: IFIC

## 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.

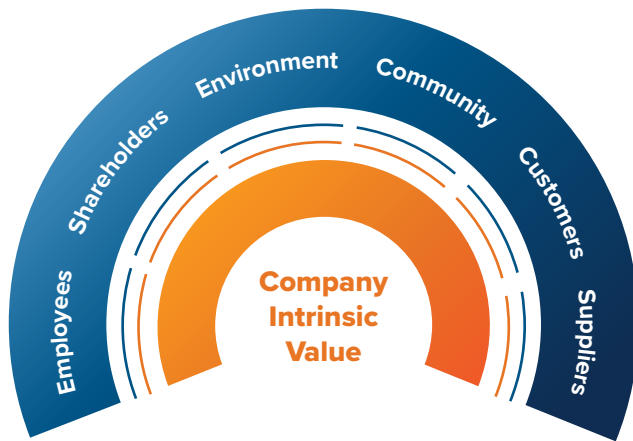
### Original, independent ESG research.

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	C\$				Mgmt Fee %
		FE	BE	LL2	LL3	
A	MFC	8357	8358	8360	8359	2.00%
F	MFC	8362	-	-	-	0.75%
PW	MFC	8368	-	-	-	1.75%
T5	MFC	8375	8376	8378	8377	2.00%
F5	MFC	8363	-	-	-	0.75%
T8	MFC	8379	8380	8382	8381	2.00%
F8	MFC	8364	-	-	-	0.75%

**Fund series descriptions:**

**Series A** – Bundled series that is available in front-end, back-end and low load purchase options.

**Series F** – An asset-based (or fee-based) series where the advisory fee is charged separately. Your dealer has entered into an agreement with Mackenzie Investments relating to the distribution of these securities.

**Series PW** – Investors are automatically enrolled to series PW once \$100,000 of household assets with Mackenzie mutual funds is reached.

**Series T5/T8** – Series that pays out an annual 5% or 8% monthly cash flow on commission based series.

**Series F5/F8** – Series that pays out an annual 5% or 8% monthly cash flow on fee-based series.

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.

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**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 Financial Advisor to learn more about **Mackenzie Betterworld Global Equity Fund.**