



**MACKENZIE**  
Investments



**LBC FINANCIAL SERVICES**

Risk  
**Medium**

Type of fund  
**Global Equity**

# Mackenzie Greenchip Global Environmental All Cap Fund

Make a difference in the environment and your portfolio

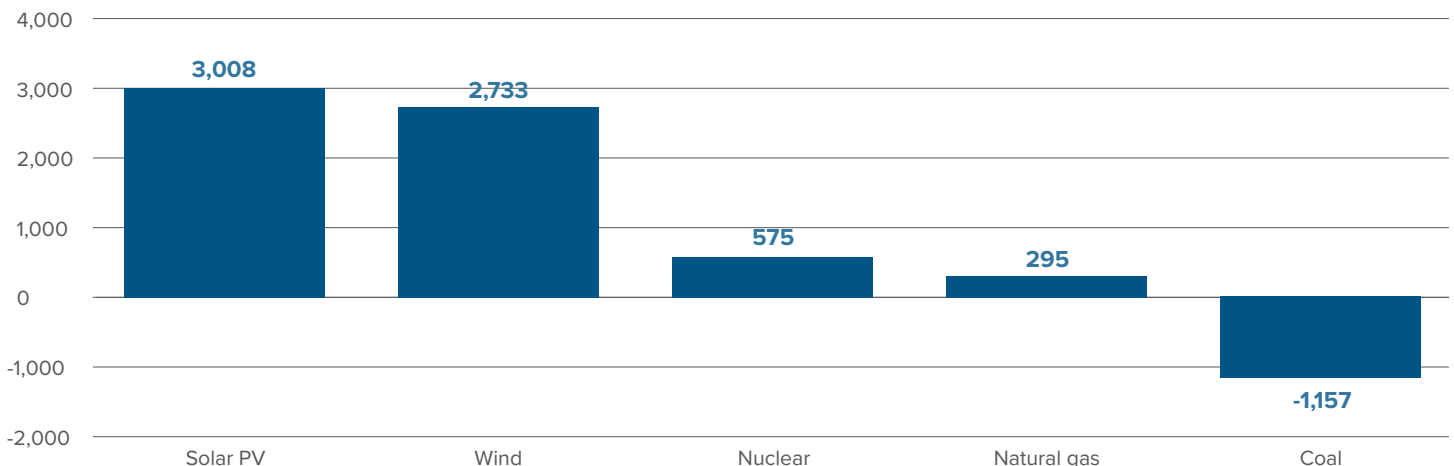
## Investing in companies that are powering a green future

While billions of dollars are being invested in responsible funds, very little of that capital is reaching the companies that actually need it to create the energy solutions that will combat climate change.<sup>1</sup>

The Mackenzie Greenchip Team is 100% invested directly in companies worldwide that are revolutionizing the way energy is made and consumed. They believe there are exceptional opportunities for investors who are on the right side of the energy transition. Investing in these areas of the economy may also provide additional diversification benefits to some investor portfolios.

## Expected change in electricity generation

By source between 2021 and 2030



Units: TWh. In 2019, Canada's total generation was 632 TWh (Source: <https://www.cer-rec.gc.ca/en/data-analysis/canada-energy-future/2021electricity/index.html>). Source: IEA, World Energy Outlook 2022. According to the "Stated Policies Scenario", which amalgamates current policy targets by global governments.

## Why invest in this fund?

- 1 Global energy transition** from fossil-fuels to renewable power is driving structural change and creating new opportunities in the energy sector.
- 2 An environmental thematic strategy** can give investors greater exposure to environmentally focused drivers, such as companies focused on clean energy, water and sustainable agriculture.
- 3 Strong historical fund performance** by established leaders in environmental themed investing since 2007.



## A team with truly green credentials

The Mackenzie Greenchip Team focuses on companies that sell environmentally superior products and services. With a careful approach, they wait until innovations are proven and economically viable without government subsidies. The companies held in the Mackenzie Greenchip Global Environmental All Cap Fund fall into six areas that focus on the “Great Energy Transition” and help in the fight against climate change. These companies are expected to benefit from the long-term trends of changing demographics, resource scarcity and environmental degradation.

### Companies held in the fund fall into six areas:



#### Clean energy

such as renewable energy (examples include solar and wind), equipment and electric infrastructure.



#### Clean-up technologies

such as waste management and pollution controls, metering and monitoring.



#### Water treatment and supply

such as water utilities and equipment.



#### Sustainable transportation

such as mass transport operators and equipment.



#### Energy Efficiency

such as building management and efficiency, lighting and power management.



#### Sustainable agriculture

such as food processing/logistics and agricultural inputs.

### MANAGED BY

## Mackenzie Greenchip Team

### John A. Cook, CIM

SVP, Portfolio Manager, Team Co-Lead  
Industry start 1991

### Gregory Payne, PhD, CFA

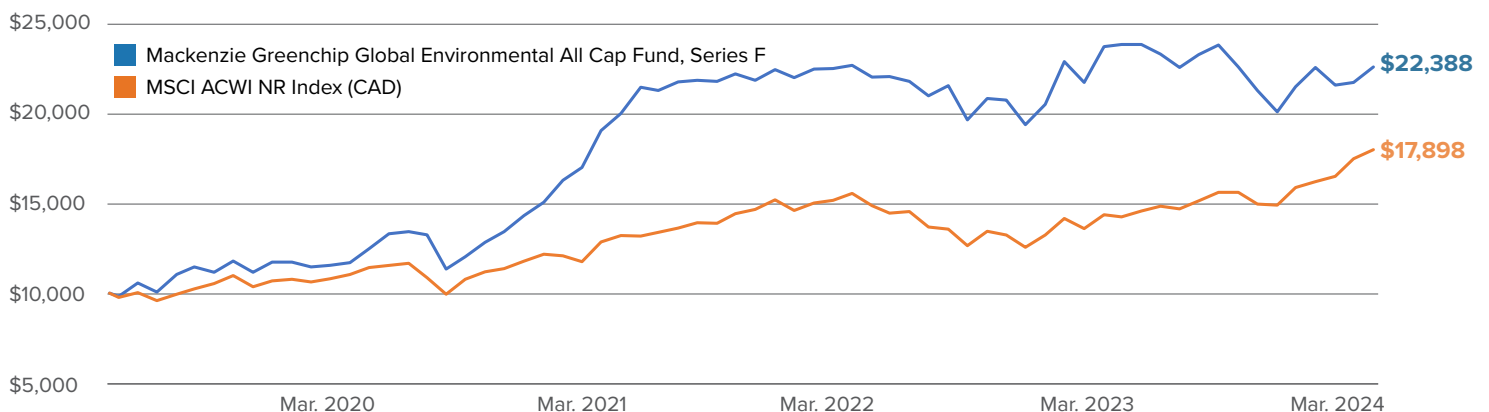
SVP, Portfolio Manager, Team Co-Lead  
Industry start 1999

## Mackenzie Greenchip Team, a proven leader in environmental themed investing

The team’s approach of investing only in companies that provide sustainable environmental solutions, is combined with a focus on buying those companies at what it considers to be significant discounts. The fund’s success can be measured by its performance since it was launched. The chart below shows how the fund has significantly outperformed its benchmark.

### Growth of \$10,000

Since inception (October 17, 2018)



Source: Morningstar, as of March 31, 2024



## Fund codes and management fees

Series	Prefix	C\$				Mgmt fee	MER†
		FE*	BE*	LL2*	LL3*		
LB	MFC	8204	-	-	-	2.00%	2.62%
LF	MFC	8205	-	-	-	0.80%	1.09%
LW	MFC	8206	-	-	-	1.00%	2.24%

†MERs as of September 30, 2023.

\* 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.

## 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.

**To learn more about the Mackenzie Greenchip Global Environmental All Cap Fund, speak to your LBC Financial Services Representative today.**

1 Source: GSIR (Global Sustainable Investing Review Report 2020 ([www.gsi-alliance.org](http://www.gsi-alliance.org)))

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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.

This document may contain forward-looking information which reflect our or third party current expectations or forecasts of future events. Forward-looking information is inherently subject to, among other things, risks, uncertainties and assumptions that could cause actual results to differ materially from those expressed herein. These risks, uncertainties and assumptions include, without limitation, general economic, political and market factors, interest and foreign exchange rates, the volatility of equity and capital markets, business competition, technological change, changes in government regulations, changes in tax laws, unexpected judicial or regulatory proceedings and catastrophic events. Please consider these and other factors carefully and not place undue reliance on forward-looking information. The forward-looking information contained herein is current only as of March 31, 2024. There should be no expectation that such information will in all circumstances be updated, supplemented or revised whether as a result of new information, changing circumstances, future events or otherwise.

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