

# Mackenzie Greenchip Team

Investing in companies that are powering a green future

## Overview

At Mackenzie Greenchip, we believe that changing demographics, resource scarcity and environmental degradation could drive extraordinary opportunities and new risks for investors. These three forces could lead to a historic “Great Energy Transition,” creating a tailwind behind environmental sectors and significant new risks for those who are unprepared.

Our bottom-up process is the foundation of our active, value-oriented approach to investing. We focus on companies that are positively exposed to the energy transition, seeking to deliver both alpha and diversification advantages. The energy transition will play out over decades and require trillions of dollars of new investment. We believe investments that are favourably exposed to these trends can help diversify against future risks within broader portfolios, such as climate change risk and inflation risk.

We have an exclusive focus on companies whose revenues are generated by selling environmentally superior products and services.

These generally fit into six sectors:

1. Clean renewable energy
2. Energy efficiency
3. Clean-up technologies
4. Water and waste
5. Sustainable agriculture and staples
6. Transportation

## Finding value in a growth space

**Investing with integrity and purpose, we look beyond short-term growth potential.**

We focus on building long-term assets that we expect will have a productive return over decades. That means finding value, paying the right price, understanding the risks and maintaining our discipline. We are patient and wait to invest in an innovation until the cost curve comes down, so it is viable in the marketplace without government subsidies. For example, the cost of solar and wind have come down so dramatically that they are now the cheapest ways to generate new energy.

### | Our approach

#### **Finding value in a growth space**

Investing with integrity and purpose, we look beyond short-term growth potential.

#### **Uncovering “best ideas” worldwide**

All-cap opportunities without borders.

#### **Environmental changemakers**

Investing in companies at the forefront of the energy transition.

### | Our strategies

- Global Environmental All Cap Equity
- Global Environmental Equity



## Uncovering “best ideas” worldwide

### All-cap opportunities without borders.

At Mackenzie Greenchip, we are open to opportunities anywhere in the world. We find that many of the most compelling opportunities reside outside of the US and Canada. Since inception, we have generally been overweight in Asia and Europe. We are overweight industrials, utilities and materials, as we provide much needed capital to companies making solar panels and several other energy efficiency technologies, or helping existing technologies become more efficient. Our approach dramatically underweights the financial services, health care and consumer discretionary sectors. Since we invest differently than the global equity benchmark, our strategies may be ideal for adding diversification to a balanced global portfolio.

## Environmental changemakers

### Investing in companies at the forefront of the energy transition.

We invest directly in companies that are developing renewable energy and clean technology, building a sustainable future for us all. We have a sliding-scale revenue requirement for inclusion in the portfolio:

Company's total revenue	Revenue from environmental products and services
Over \$1 billion	20%
Over \$100 million	50%
Less than \$100 million	100%

These companies include makers and distributors of new forms of energy, such as solar, wind, batteries, biomaterial and beyond; infrastructure; clean technology; and energy efficient equipment and processes. Today and over the coming decades, this much-needed innovation will change the way our world works — from transportation to agriculture to industry.

## Mackenzie Greenchip Team



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Senior Vice President, Portfolio Manager, Team Co-Lead  
Joined Mackenzie in 2021.  
Investment experience since 1991.



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Joined Mackenzie in 2021.  
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Investment Analyst  
Joined Mackenzie in 2024.  
Investment experience since 2024.



**Rohit Bhalgat**  
Senior Investment Analyst  
Joined Mackenzie in 2023.  
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For more information about the [Mackenzie Greenchip Team](#), please contact Mackenzie Institutional sales team.

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