



Mackenzie Betterworld Team

We strive to invest in companies that are making a positive impact on people and the planet.

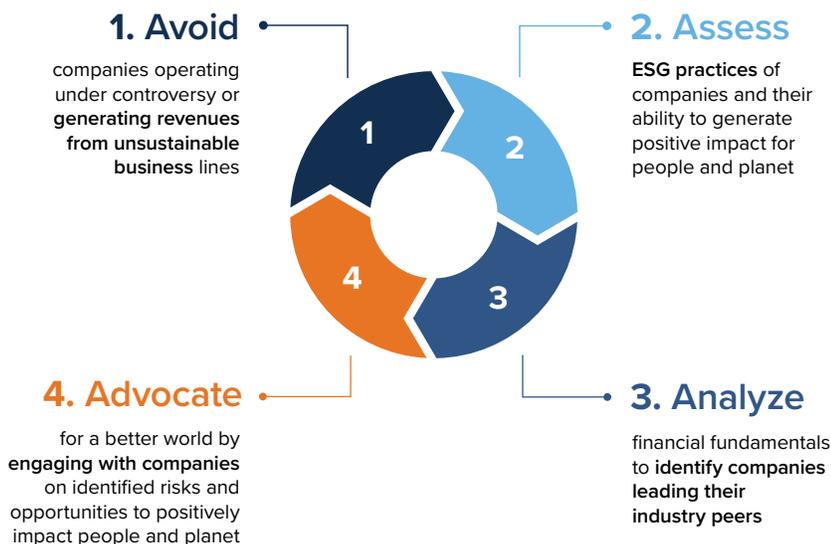
Overview

We are a core portfolio management team that incorporates propriety ESG analysis with fundamental analysis, and proactive stewardship to identify growth opportunities and mitigate risk.

Our proprietary process combines negative and positive screening with the goal of avoiding unsustainable or controversial businesses, and favours companies that contribute to the United Nations Sustainable Development Goals. Our Canadian and global portfolios restrict exposure to fossil fuels¹, which are significant contributors to global warming and greenhouse gas emissions.²

Led by Andrew Simpson, who has managed sustainable investing mandates since 2010, the Mackenzie Betterworld Team brings decades of leading ESG expertise along with proven results. Andrew has over 20 years of analytical and portfolio manager experience leading both Canadian and global mandates.

Our proprietary four As investment process leads with ESG



Our approach

Combining proprietary ESG research with fundamental analysis

We believe that companies with strong sustainability characteristics and attractive fundamentals can outperform over a market cycle.

Core equity with purpose

Diversified, large-cap equity portfolios focused on sustainable business models.

Active ownership

Proactive engagement on material ESG issues encourages good companies to become even better.



Combining proprietary ESG research with fundamental analysis

At Mackenzie Betterworld, we lead with enhanced ESG analysis followed by comprehensive financial analysis.

Our priority is to rule out companies with poor ESG performance, then identify companies with the ability to generate positive impact on people and the environment through progressive ESG practices and behaviours.

We don't rely on ESG ratings or scores from third parties. We conduct original research using our own proven, proprietary process to uncover and evaluate opportunities that meet our ESG standards and financial criteria metrics. With Mackenzie Betterworld, investors benefit from the team's independent investment methodology backed by the strength of Mackenzie.

Core equity with purpose

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

Investor surveys in recent years suggest a growing number of Canadians want to invest responsibly, with purpose. That's why our funds are designed as core holdings. Our Canadian and global portfolios are comprised mainly of large-cap equities that are well diversified across sectors and regions. Managed in a growth style, undergoing rigorous ESG and fundamental analysis, our funds are designed to deliver competitive returns while mitigating risk. We believe sustainability is a long-term strategy that can play a role in any portfolio.

Active ownership

We believe that a company has a responsibility to all its stakeholders, not just its shareholders.

In our view, companies that can successfully balance the interests of stakeholders can better manage risks, capture opportunities and ultimately, better align to a sustainable future.

Active ownership is an important part of our process. As stewards of capital, we have a responsibility to engage with companies to maintain a dialogue on managing material ESG risks and delivering positive impact to their stakeholders.

Mandates

Mackenzie Betterworld
Global Equity Fund

Mackenzie Betterworld
Canadian Equity Fund

Components

Mackenzie Global Sustainable
Balanced Fund



The Mackenzie Betterworld Team



Andrew Simpson, CFA

Senior Vice President, Portfolio Manager, Head of Team

Joined Mackenzie in 2021.
Investment experience since 1997.



Jonas Cuypers, CFA

Director, Investment Research

Joined Mackenzie in 2020.
Investment experience since 2012.



Stan Li, CFA, CPA, CGA

Director, Investment Research

Joined Mackenzie in 2021.
Investment experience since 2013.

Fund codes and management fees

Fund name	Series	Prefix	FE	BE**	LL3**	Mgmt fee	MER*
Mackenzie Betterworld Global Equity Fund	A	MFC	8331	8332	8333	2.00%	2.55%
	F	MFC	8336	-	-	0.80%	1.06%
	PW	MFC	8342	-	-	1.80%	2.14%
Mackenzie Betterworld Canadian Equity Fund	A	MFC	8357	8358	8359	2.00%	2.50%
	F	MFC	8362	-	-	0.75%	0.98%
	PW	MFC	8368	-	-	1.75%	2.07%
Mackenzie Global Sustainable Balanced Fund	A	MFC	5256	5257	5258	1.85%	2.34%
	F	MFC	5260	-	-	0.70%	0.94%
	PW	MFC	6997	-	-	1.70%	2.04%

* MERs as of September 30, 2024.

** 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.

To learn more about the [Mackenzie Betterworld Team](#), please speak to your financial advisor.

¹ Mackenzie Betterworld portfolios exclude companies that derive at least 10% of their revenues from the exploration, extraction, or production of thermal coal, oil sands, shale energy, arctic oil and gas.

² Source: The UN Climate Action report.

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.

The content of this document (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.