



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.

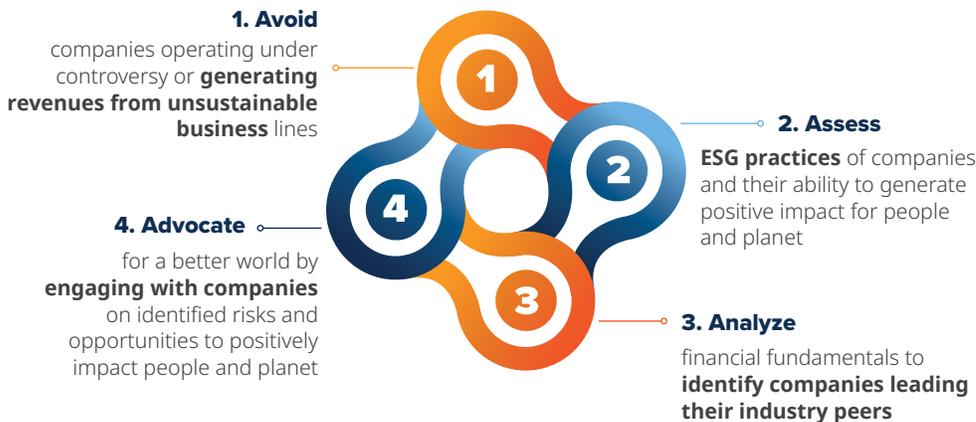
And we don't stop there. Ongoing advocacy and pro-active engagement with companies help to advance sustainability into the future.

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

- + ESG first**
Starting with ESG analysis and then conducting 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



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.

No outsourcing

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.

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

“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**
Head of Team,
Mackenzie Betterworld Team



The Betterworld Team



Head of Team: Andrew Simpson, CFA
Senior Vice President, 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, 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.
- BA 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.
- MA in international economics from Johns Hopkins University SAIS.



Mandates	Series	Prefix	FE	BE	LL2	LL3	Mgmt Fee
Betterworld Canadian Equity Fund	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%
Betterworld Global Equity Fund	A	MFC	8331	8332	8334	8333	2.00%
	F	MFC	8336	–	–	–	0.80%
	PW	MFC	8342	–	–	–	1.80%
	T5	MFC	8349	8350	8352	8351	2.00%
	F5	MFC	8337	–	–	–	0.80%
	T8	MFC	8353	8354	8356	8355	2.00%
	F8	MFC	8338	–	–	–	0.80%

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\$1,237 billion in assets. (31/12/21)



For more information about the **Mackenzie Betterworld Team**, please contact your Financial Advisor.