

NBI Sustainable Funds

NBI Sustainable Canadian Equity Fund



Responsible investing is much more than just a product trend. It is an investment philosophy that goes beyond calculating returns on investments. Doing good for the planet is also doing good for your portfolio.

What is responsible investing?

Above all, responsible investing means investing in progress by improving business processes, and believing that companies that offer innovative solutions will grow faster than those with more traditional models.

These investment solutions are comprised of themed securities related to sustainability and conducive to worldwide advancement, while also considering future financial returns. Organizations that promise to combat climate change and environmental destruction by developing clean tech, for example, fit this definition.

Examples of responsible themes

Fighting climate change	Healthy living and well-being	Clean and affordable energy
Focus on countries with affordable and scalable production solutions to build cleaner and more robust economies.	Improve global health care systems to build productive and prosperous societies.	Facilitate access to renewable energy to contribute to the economy and create new jobs.

Why should you increase your exposure?

Look to the long term

There is much more to gain from responsible investments than just a clear conscience. Investors who align their long-term investments horizons with the goals of the companies in their portfolios tend to feel more accountable for their performance.

Stick to your values and your investment goals

- › Vote for what’s important to you with your wealth.
- › Invest in companies that share your values.

Add ESG analysis and evaluation to your investment strategy

Consideration of environmental, social and governance (ESG) criteria, in conjunction with traditional financial analysis, allows our portfolio managers to better assess investment risks and opportunities.

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Innovation is central to our products

NBI aims to be an accelerator promoting the growth and development of investment solutions and services, with the objectives of having a positive impact on the lives of investors. We offer the first platform of actively managed exchange-traded funds based on the UN Sustainable Development Goals in Canada. To learn more about our responsible investment approach, go to nbinvestments.ca/responsible-investment.

NBI Sustainable Canadian Equity Fund	
Portfolio Manager	National Bank Trust Inc.
Sub-advisor	Fiera Capital Corporation
Investment objective	Provide long-term capital growth while following a sustainable approach to investing.
Investment philosophy	Invest in well-valued securities, whose companies are led by competent management groups that have demonstrated an ability to properly manage the business and allocate capital with a long-term outlook.
Benefits	<ul style="list-style-type: none"> › Analytical approach to investments, with a focus on the quality of businesses, capital preservation and ESG criteria. › The contribution of ESG considerations is quantified and categorized according to the UN Sustainable Development Goals.
Investment horizon	The investor can commit to investing their funds for more than five years.
Volatility	Fluctuations in the value of the fund are considered medium over the given period.
Investment style	The type of assets held in this fund gives it a “mixed” investment style.
Sector deviation	The sector deviation between the Fund’s positioning and the benchmark’s positioning is considered moderate.



Open architecture.
Endless opportunities.

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