

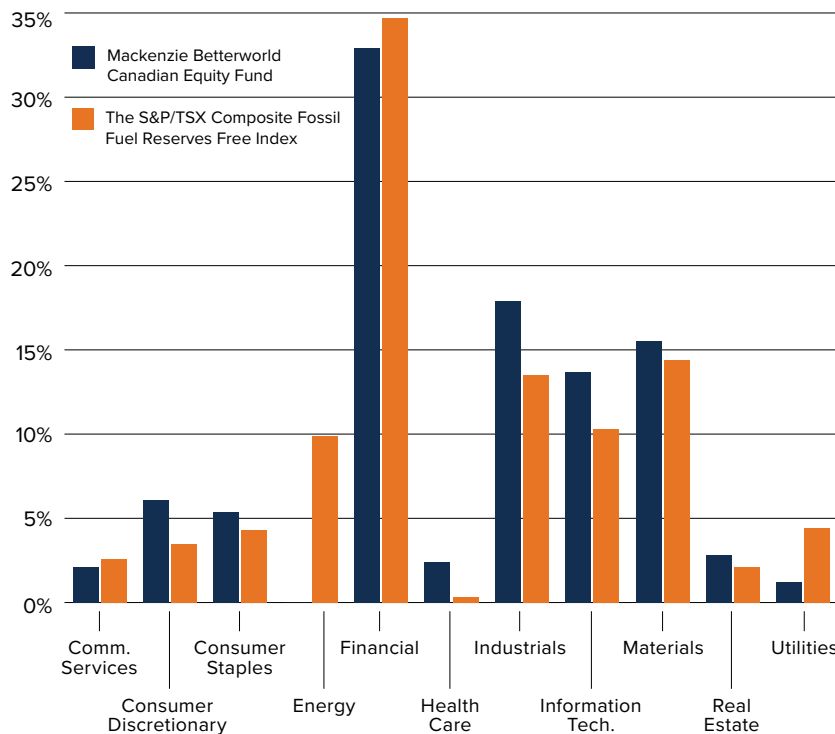


# Mackenzie Betterworld Canadian Equity Fund

## Sustainable, core solution with competitive growth potential

Designed as a core holding, the Mackenzie Betterworld Canadian Equity Fund invests primarily in large cap, established companies diversified across sectors. Managed in a growth style, the fund looks at industry leaders with reasonable valuations and above average earnings growth potential. With rigorous ESG and fundamental analysis, the fund is designed to deliver competitive returns while mitigating risk. Active bottom-up security selection through the Mackenzie Betterworld four A's investment process drives the potential for alpha generation.

FIGURE 1 – Canadian equity sector allocation



Source: Mackenzie Investments, as of March 31, 2025.

## Why invest in this fund?

### 1. Core equity with purpose

Focused mainly on large-cap companies demonstrating sustainable business models.

### 2. Combining proprietary ESG research with fundamental analysis

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

### 3. Active ownership

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

## Managed by

Mackenzie  
Betterworld Team



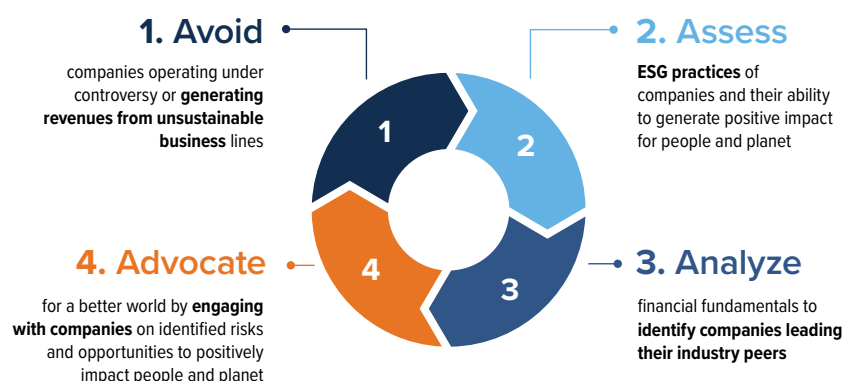
## Investing in companies with strong fundamental and sustainability characteristics

At Mackenzie Betterworld we incorporate propriety ESG analysis with fundamental analysis to identify growth opportunities and to mitigate risk.

We do not rely on ESG ratings or scores from third parties. We conduct propriety research using our proven process to uncover and evaluate opportunities that meet our ESG standards and financial criteria metrics.

This process combines negative and positive screening with the goal of avoiding unsustainable or controversial businesses, while favouring companies that contribute to the United Nations Sustainable Development Goals (SDGs).

**FIGURE 2 - Our proprietary four A's investment process leads with ESG**



### EXCLUSIONS

The fund restricts exposure to **fossil fuels**<sup>1</sup>, and has the following exclusions<sup>2</sup>:

- Adult entertainment
- Controversial weapons
- Gambling
- Tobacco
- Private prisons

## Active ownership helps build deeper relationships

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.



## Portfolio Manager

**Andrew Simpson, CFA**  
SVP, Portfolio Manager, Team Lead  
Mackenzie Betterworld Team  
Industry start: 1997

### FUND CODES AND MANAGEMENT FEES

Series	Prefix	C\$			Mgmt fee	MER*
		FE	BE**	LL3**		
A	MFC	8357	8358	8359	2.00%	2.50%
F	MFC	8362	-	-	0.75%	0.98%
FB	MFC	8365	-	-	1.00%	1.32%
PW	MFC	8368	-	-	1.75%	2.07%
T5	MFC	8375	8376	8377	2.00%	2.50%
T8	MFC	8379	8380	8381	2.00%	2.53%

\* 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.

### FUND SERIES DESCRIPTIONS

**Series A** – Bundled series that is available in front-end, back-end and low load purchase options.

**Series F** – An asset-based (or fee-based) series where the advisory fee is charged separately. Your dealer has entered into an agreement with Mackenzie Investments relating to the distribution of these securities.

**Series FB** – The advisory fee is unbundled and can be negotiated between the investor/ advisor. Your dealer has entered into an agreement with Mackenzie Investments relating to the distribution of these units.

**Series PW** – Investors are automatically enrolled to series PW once \$100,000 of household assets with Mackenzie mutual funds is reached.

**Series T5/T8** – Series that pays out an annual 5% or 8% monthly cash flow on commission-based series.

Additional fund series available at [mackenzieinvestments.com/fundcodes](https://mackenzieinvestments.com/fundcodes)

To learn more about the [Mackenzie Betterworld Canadian Equity Fund](#), speak to your advisor or your Mackenzie sales team.

<sup>1</sup> 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.

<sup>2</sup> In addition to the firmwide exclusions of anti-personnel landmines and cluster munitions, all sustainable investment solutions including Mackenzie Betterworld portfolios exclude companies that derive at least 10% of their revenues from the following unsustainable industries: adult entertainment, controversial weapons, gambling, tobacco, private prisons. To learn more about our exclusions, see our Sustainable Investing Policy.

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.

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