

# Sustainable Investing - Fad or Forever

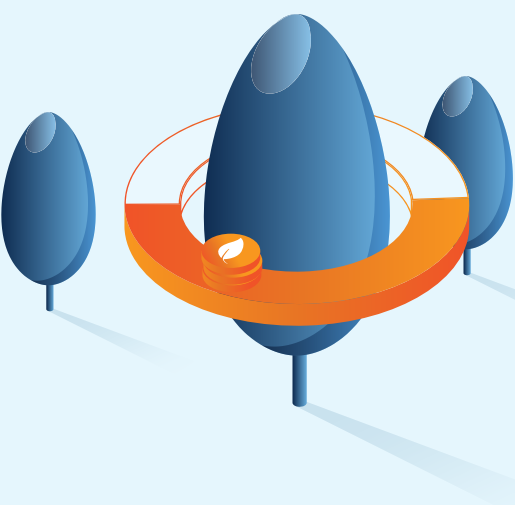


At Mackenzie Investments, sustainable investing means we use environmental, social, governance (ESG) factors to mitigate risks through responsible investing practices that aim to find opportunities for better returns or generate a positive impact through sustainable solutions.

## The question is whether sustainable investing is a fad or here to stay?

Globally, sustainable investing assets now exceed **\$50 trillion** with responsible investing<sup>1</sup> taking the lion's share of the assets utilizing approaches such as ESG integration and stewardship practices.<sup>2</sup>

For context, the total market capitalization of the S&P 500 and Toronto Stock Exchange are **\$40 trillion** and **\$3.2 trillion**, respectively.<sup>3</sup>



Momentum in Canada is **growing** as investors and asset managers recognize the positive impact of analyzing ESG factors alongside financial metrics.

**51%** of all professionally managed assets in Canada use a sustainable investing strategy.<sup>4</sup>



**75%** of Canadian investors surveyed want to be informed about sustainable investing strategies.<sup>5</sup>

Canadian retail advisors prioritize **environmental factors** with a big focus on the impact to climate change.

As investor interest continues to grow, financial advisors will look to increase their allocation to sustainable solutions over the **next 3-5 years**.<sup>6</sup>



Sustainable investing **doesn't mean** one has to sacrifice returns.



In fact, **74%** of Canadian sustainable solutions outperformed their respective Morningstar category peers over the full calendar year in 2020.<sup>7,8</sup>

**"It's not just a fad. It's here to stay."  
Real impact. Real sustainable investing.**

**Investors + Advisors + Mackenzie. That's better together**

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Source:

[1] A strategy and practice to incorporate environmental, social and governance (ESG) factors in investment decisions and active ownership.

[2] Opimas, Pensions & Investments Research, 2020 projected Global SI AUM

[3] S&P Global and Toronto Stock Exchange as of December 31, 2020

[4] Toronto Stock Exchange, A Primer for Environmental & Social Disclosure, August 2020

[5] Responsible Investment Association, 2020 RIA Investor Opinion Survey

[6] Mackenzie Investments research in partnership with consulting firm Phase 5 surveyed 324 Canadian advisors

[7] Canadian mutual funds based on their respective Morningstar Category peer groups on a risk-adjusted basis after fees. ©2020 Morningstar Research Inc. All Rights Reserved. The information contained herein: (1) is proprietary to Morningstar; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete, or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information. Past performance is no guarantee of future results.

[8] Morningstar Research Inc., Sustainable Investing Landscape for Canadian Fund Investors, Q4 2020

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