



NEI

Discover new investment opportunities

A guide to socioeconomic trends
and corporate culture

NEI Global Corporate Leaders Fund

In an ever-evolving world, the financial landscape is no exception.

As demographics shift, technologies advance, and societal values transform, new investment opportunities are emerging rapidly. Are you prepared to navigate this dynamic environment and guide your clients towards investments that not only grow but also contribute to positive change?

This guide is designed to help encourage meaningful discussions about the transformative power of long-term socioeconomic trends, which are at the core of the NEI Global Corporate Leaders Fund.



Explore powerful economic drivers

Corporate Culture

As societal norms evolve, so does the world of work. Companies with strong corporate cultures have experienced a **4x increase** in revenue,¹ highlighting the importance of workplace culture in driving performance.

The Silver Economy

The spending power of individuals over 65 is projected to increase from \$8.7 trillion in 2020 to an astounding **\$15 trillion** by 2030.² This demographic shift presents a significant market opportunity in sectors such as healthcare, senior care, and products tailored to an aging population.

Wealth Trajectory for the Bottom Billions

Strong demographics and GDP growth in emerging markets are expected to propel approximately **3 Billion** people into the global middle class by 2030.³ This expanding middle class will drive significant demand for financial services, consumer goods, and infrastructure, creating a compelling investment landscape.

Rising Chronic Disease

The prevalence of chronic diseases is a growing concern with estimates indicating that by 2050 **99.5%** of individuals aged 50 or older will have at least one chronic condition.⁴ This trend underscores a substantial investment opportunity in companies developing innovative healthcare solutions and preventive care.

Transformative Technology and Urbanization

With **3.2 Billion** people currently living in areas covered by mobile broadband networks but not using mobile internet, there is a vast opportunity for investments in equitable connectivity solutions and digital infrastructure.⁵

AI and Automation

While AI and automation may displace millions of jobs by 2025, they are also expected to create approximately **133 Million** new roles requiring higher skill and education levels.⁶ Investing in companies focused on education, job training, and AI-powered solutions can help navigate this changing landscape.

Take advantage of the opportunities

The NEI Global Corporate Leaders Fund is positioned to invest in companies at the forefront of these socioeconomic trends. By investing in this fund, one of the first of its kind in Canada, you can offer your clients exposure to a diversified portfolio of companies that aim not only for financial returns but also to shape a more sustainable, equitable, and technologically advanced future.



For additional resources and to learn more about the NEI Global Corporate Leaders Fund visit neiinvestments.com or talk to your NEI wholesaling team.

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¹ Forbes 2021: "Culture Is A Company's Single Most Powerful Advantage. Here's Why" ² Individuals >65 years old. Wolfgang Fengler, "The silver economy is coming of age: A look at the growing spending power of seniors," Brookings, 14 January 2021. ³ Barclays Private Bank, "See beyond: thematic investing, August 2020. ⁴ Ansah JP, Chiu CT. Projecting the chronic disease burden among the adult population in the United States using a multi-state population model. Front Public Health. 2023 Jan. ⁵ 2022 Mobile Industry Impact Report: Sustainable Development Goals," GSMA, 2022 September. ⁶ The Future of Jobs Report 2023, World Economic Forum, April 2023.

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25-06-1021935E