

Performance with purpose

The past year has been a remarkable period for our organization. We participated in many meaningful engagements in an effort to ensure our clients' investments performed with purpose, and we continued to be a vocal influence in the world. Below is a snapshot of what we've done in 2024.

Influential interactions—discussing, influencing and delivering change

- **100 hours** of sub-advisor due diligence meetings across Canada, the U.S., the UK, and Europe.
- Engaged with **98 companies** addressing focus themes such as social and natural capital, net-zero alignment, and governance.
- Collaborated with sustainability groups like **Ceres** and **Energy Futures Lab** on climate solutions, water conservation, and renewable energy.

Leading with our voice—articulating our convictions with confidence and expertise

Participated in **numerous** industry events including:

- Share Investor Summit in Vancouver
- The Summit for Asset Management Toronto
- Responsible Investor's USA Conference

Creating an impact—the breadth of our influence and work

- Organized a **roundtable with oil and gas companies** and financial institutions in coordination with the Oil & Gas Methane Partnership 2.0 (OGMP 2.0).
- Sponsored various influential industry events such as the **2025 Principles for Responsible Investment (PRI) conference** in Toronto, and publications like the **Responsible Investment Association's (RIA) RI Trends report**.
- **Access to Medicine Foundation** invited us to perform a comprehensive review of their organization.

Why this matters to you

NEI Investments has been at the forefront of responsible investing for almost 40 years. By partnering with us, your clients will see that performance and purpose are complementary. The work we are doing behind the scenes is designed to enhance our investment performance and support more informed conversations.

View the full Responsible Investment Report 2025 by scanning the QR code or visit neiinvestments.com for more information.



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