



NEI INVESTMENTS WINS FOUR FUNDGRADE A+ AWARDS AT FUNDATA CANADA'S "EVENING OF EXCELLENCE"

[TORONTO, JANUARY 23, 2014] NEI Investments ["NEI"] is pleased to announce the winning of four Fundata FundGrade A+ Awards, presented on January 22, 2014 at Fundata Canada Inc.'s Evening of Excellence award ceremony.

The **NEI Northwest Tactical Yield Fund** and **NEI Ethical Canadian Equity Fund** were recognized with A+ Awards in their respective mutual fund categories and **NEI Ethical Special Equity Fund** and **NEI Ethical Select Growth Portfolio** were honoured in the socially responsible investing ["SRI"] category.

The Fundata FundGrade A+ Awards are presented annually to Canadian investment funds that achieve consistently high FundGrade scores through an entire calendar year. The Fundata FundGrade A+ rating is a score-based calculation that determines the annual "best-of-the-best" in the Canadian mutual fund industry. It provides investors, advisors, and fund managers with a single, reliable, easy-to-understand fund-performance rating based on an entire calendar year.

"To have multiple award-winners across our fund line-up truly special", said NEI CIO Daniel Solomon. "It reflects the strong and consistent outperformance that we strive for across our overall complex."

The make-up of this elite quartet of award-winning funds is what makes the most powerful statement:

As of December 31, 2013, the combined assets across these "A+ Funds" represented almost \$1.5 billion or over 25% of NEI's total Assets Under Management ["AUM"] - Less than 1% of the fund universe covered by Fundata can make a similar claim

The award-winning funds also cover a broad array of strategies and portfolio management teams:

- NEI Ethical Canadian Equity and NEI Ethical Special Equity - two Canadian equity funds - large cap and small cap - sub-advised by QV Investors;
- NEI Northwest Tactical Yield - A perennial category leading tactical balanced strategy that incorporates high yield and Canadian fixed income (managed by Aviva Investors), Canadian equities (managed by Beutel Goodman) and U.S. dividend-paying equities (managed by River Road Asset Management);
- NEI Ethical Select Growth Portfolio – A portfolio that invests in a broad range of NEI Ethical Funds that was constructed and is regularly monitored by the Portfolio Management team at NEI Investments.

A synopsis of Fundata's rating system is provided below. More information about the 2013 A+ Award recipients and Fundata's methodology can be found at: <http://www.fundgradeawards.com>.

ABOUT FUNDATA'S FUNDGRADE METHODOLOGY

FundGrades range from A to E, based solely on a fund's risk-adjusted performance relative to its peers in the respective CIFSC category.

Risk-adjusted performance is defined by an equal weighted measure of the Sharpe ratio, Sortino ratio, and Information ratio. Only funds with at least two years of performance are eligible for a FundGrade, with higher weight placed on recent performance, up to 10 years.

A fund will receive multiple FundGrades each year as new performance data becomes available and risk-adjusted metrics are calculated for subsequent rolling periods.

ABOUT NEI INVESTMENTS

NEI Investments is a national investment firm with approximately \$6 billion in assets under management. It offers Canadian retail investors unique access to top independent money managers through high quality investment solutions in two fund families, Northwest Funds and Ethical Funds. Its products provide investors with a full range of investment management styles as well as conventional and socially responsible investment choices.



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NEI Investments is owned 50% by the Provincial Credit Union Centrals and 50% by Desjardins Group. This backing of experience and resources allows NEI Investments to actively support business growth in these networks as well as independent advisor channels.

NEI Investments has offices in Toronto, Vancouver and Montreal.