



PRESS RELEASE

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## NEI Brings New Responsible Investment Mandates to Canadians

TORONTO, May 4, 2020 – NEI Investments (Northwest & Ethical Investments L.P.) today announced that changes to NEI Global Sustainable Balanced Fund and NEI ESG Canadian Enhanced Index Fund have been successfully implemented. The changes – [previously announced](#) on January 23, 2020 – include fee reductions, new investment objectives and strategies, new sub-advisors, and new fund names.

NEI Global Sustainable Balanced Fund and NEI ESG Canadian Enhanced Index Fund were previously called NEI Balanced RS Fund and NEI Jantzi Social Index® Fund, respectively.

“With NEI Global Sustainable Balanced Fund, we’re reinvigorating one of the country’s original responsible investment solutions to meet Canadians’ growing desire to make an impact with their money,” said John Bai, Vice President and Chief Investment Officer for NEI Investments. “We’re also bringing the specialized investment expertise of Impax Asset Management, a global leader in sustainable investment strategies, to more Canadians,” he added. Impax Asset Management is the new sub-advisor for NEI Global Sustainable Balanced Fund, and is also the sub-advisor for NEI Environmental Leaders Fund.

“We’re embedding over 30 years of responsible investment experience into NEI ESG Canadian Enhanced Index Fund,” said David Rutherford, Vice President, ESG Services for NEI Investments. “Investors can benefit from enhanced risk management through our in-house evaluation of environmental, social and governance factors, and participate in the success of our corporate engagement activities on the home front.”

NEI Global Sustainable Balanced Fund and NEI ESG Canadian Enhanced Index Fund are rich with features for Canadians looking to bolster their commitment to responsible investing:

### **NEI Global Sustainable Balanced Fund**

- Strategic 60/40 equity/fixed income allocation thoughtfully designed for investors seeking a one-stop, globally diversified responsible investment solution.
- Fixed income and equity allocations sub-advised by Impax Asset Management, a global investment manager focused on building a more sustainable future.
- Equity allocation invests in companies on the cutting edge of resource optimization in the areas of water, energy, food, and waste management.
- Fixed income allocation invests in bonds supporting eight areas of impact, including gender equality, affordable housing, education, sustainable infrastructure, and community development.
- Transparent reporting of impact data so investors can see the measurable difference they are making.

### **NEI ESG Canadian Enhanced Index Fund**

- Full application of NEI’s industry leading responsible investment capabilities: proprietary ESG evaluation, corporate engagement, proxy voting and policy work.



- Starting universe of stocks is the Solactive Canada Broad Market Index provided by Solactive AG of Germany, a specialist in developing tailor-made and multi-asset class index solutions for clients globally.
- NEI will customize the index by excluding certain companies based on proprietary ESG evaluation, with quarterly index rebalancing by Solactive.
- Cost-efficient option for retail and institutional investors seeking a domestic equity solution for their responsible investment portfolios.

### **About NEI Investments**

NEI Investments (Northwest & Ethical Investments L.P.) is a Canadian asset manager committed to providing focused investment solutions advised by best-of-breed, independent portfolio managers. NEI delivers disciplined, active asset management with a longstanding focus on environmental, social and governance factors, and a well-defined corporate engagement process designed to create sustainable long-term value. NEI is a wholly owned subsidiary of Aviso Wealth, a national, integrated financial services company, with approximately \$60 billion in assets. For more information please visit [www.neiinvestments.com](http://www.neiinvestments.com) and [www.aviso.ca](http://www.aviso.ca)

### **About Impax Asset Management**

Impax Asset Management is a specialist asset manager, with approximately C\$28 billion in assets under management as of March 31, 2020, in equity, fixed income, and infrastructure strategies. Founded in 1998, with headquarters in London and offices in the U.S. and Hong Kong, Impax invests in the opportunities arising from the transition to a more sustainable global economy. Impax believes that capital markets will be shaped profoundly by global sustainability challenges, including climate change, pollution and essential investments in human capital, infrastructure and resource efficiency. These trends will drive growth for well-positioned companies and create risks for those unable or unwilling to adapt. Impax offers a well-rounded suite of investment solutions spanning multiple asset classes seeking superior risk-adjusted returns over the medium to long term. [www.impaxam.com](http://www.impaxam.com)

### **About Solactive and the Solactive Canada Broad Market Index**

Solactive AG is an innovative index provider and financial data and technology provider that focuses on the development, calculation and distribution of tailor-made indices across all asset classes. As at April 2020, Solactive AG served approximately 450 clients in Europe, America and Asia, with approximately US\$200 billion invested in products linked to indices calculated by the company globally, primarily via 450 exchange-traded funds from a number of well-known providers. Solactive AG was established in 2007 and is headquartered in Frankfurt, with additional offices in Berlin, Dresden, Hong Kong and Toronto. For further information, please visit: [www.solactive.com](http://www.solactive.com)

The Solactive Canada Broad Market Index is a free float market capitalization common stock index that covers all Canadian securities listed on the Toronto Stock Exchange which fulfill basic liquidity criteria.

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