

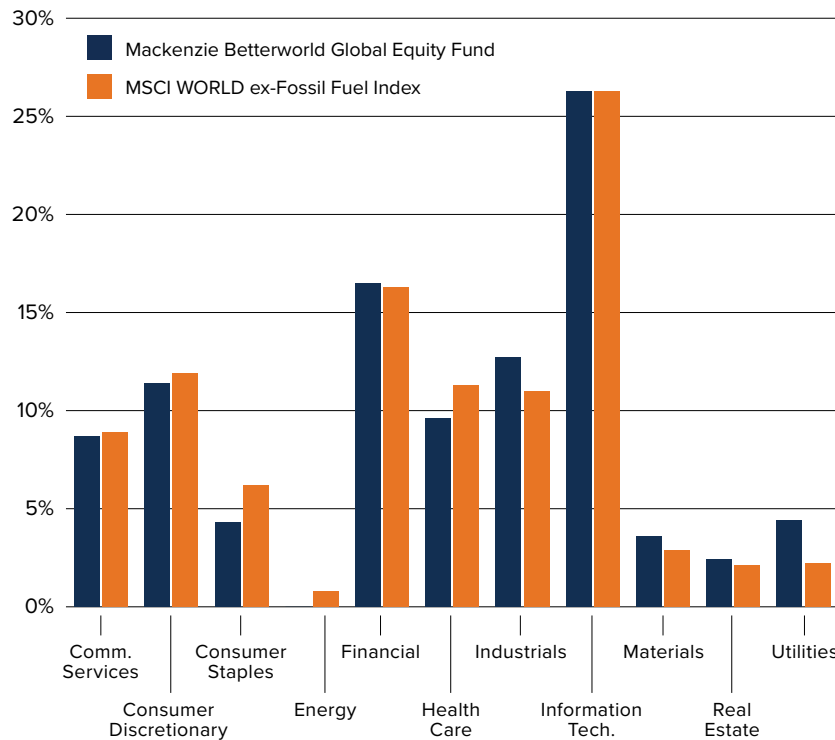


Mackenzie Betterworld Global Equity Fund

Sustainable, global core solution with competitive growth potential

Designed as a core holding, the Mackenzie Betterworld Global Equity Fund invests primarily in large cap, established companies diversified across sectors. Managed in a growth style, the fund looks at industry leaders with reasonable valuations and above average earnings growth potential. With rigorous ESG and fundamental analysis, the fund is designed to deliver competitive returns while mitigating risk. Active bottom-up security selection through the Mackenzie Betterworld four A's investment process drives the potential for alpha generation.

FIGURE 1 – Global equity sector allocation



Source: Mackenzie Investments, as at December 31, 2024

Why invest in this fund?

- 1. Core equity with purpose**
Focused mainly on large-cap companies demonstrating sustainable business models.
- 2. Combining proprietary ESG research with fundamental analysis**
We believe that companies with strong sustainability characteristics and attractive fundamentals can outperform over a market cycle.
- 3. Active ownership**
Proactive engagement on material ESG issues encourages good companies to become even better.

Managed by

**Mackenzie
Betterworld Team**



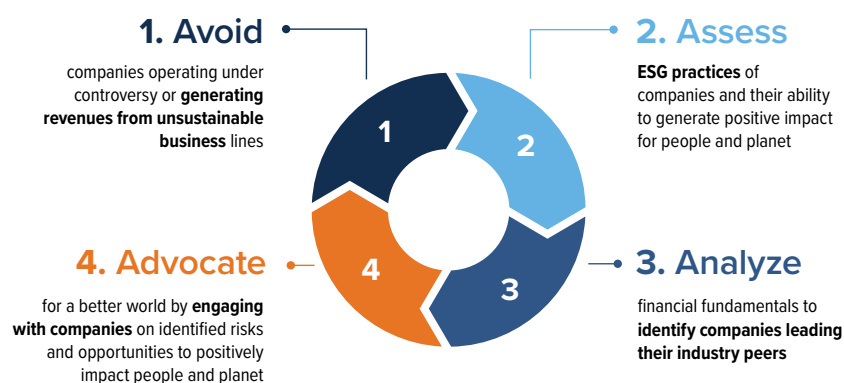
Investing in companies with strong fundamental and sustainability characteristics

At Mackenzie Betterworld we incorporate propriety ESG analysis with fundamental analysis to identify growth opportunities and to mitigate risk.

We do not rely on ESG ratings or scores from third parties. We conduct propriety research using our proven process to uncover and evaluate opportunities that meet our ESG standards and financial criteria metrics.

This process combines negative and positive screening with the goal of avoiding unsustainable or controversial businesses, while favouring companies that contribute to the United Nations Sustainable Development Goals (SDGs).

FIGURE 2 - Our proprietary four A's investment process leads with ESG



EXCLUSIONS

The fund restricts exposure to **fossil fuels**¹, and has the following exclusions²:

- Adult entertainment
- Controversial weapons
- Gambling
- Tobacco
- Private prisons

Active ownership helps build deeper relationships

We believe that a company has a responsibility to all its stakeholders, not just its shareholders. In our view, companies that can successfully balance the interests of stakeholders can better manage risks, capture opportunities and ultimately, better align to a sustainable future.

Active ownership is an important part of our process. As stewards of capital, we have a responsibility to engage with companies to maintain a dialogue on managing material ESG risks and delivering positive impact to their stakeholders.



Portfolio Manager

Andrew Simpson, CFA
SVP, Portfolio Manager, Team Lead
Mackenzie Betterworld Team
Industry start: 1997

FUND CODES AND MANAGEMENT FEES

Series	Prefix	C\$			Mgmt fee	MER*
		FE	BE**	LL3**		
A	MFC	8331	8332	8333	2.00%	2.55%
F	MFC	8336	-	-	0.80%	1.06%
FB	MFC	8339	-	-	1.00%	1.37%
PW	MFC	8342	-	-	1.80%	2.14%
T5	MFC	8349	8350	8351	2.00%	2.61%
T8	MFC	8353	8354	8355	2.00%	2.39%

* MERs as of September 30, 2024.

** Effective June 1, 2022, the redemption charge purchase option, and the low-load purchase option are no longer available for purchase, including those made through systematic purchase plans such as pre-authorized contribution plans. Switching from securities of a Mackenzie Fund previously purchased under the redemption charge or low-load purchase options to securities of another Mackenzie Fund, under the same purchase option, will continue to be available until such redemption schedules expire.

FUND SERIES DESCRIPTIONS

Series A – Bundled series that is available in front-end, back-end and low load purchase options.

Series F – An asset-based (or fee-based) series where the advisory fee is charged separately. Your dealer has entered into an agreement with Mackenzie Investments relating to the distribution of these securities.

Series FB – The advisory fee is unbundled and can be negotiated between the investor/ advisor. Your dealer has entered into an agreement with Mackenzie Investments relating to the distribution of these units.

Series PW – Investors are automatically enrolled to series PW once \$100,000 of household assets with Mackenzie mutual funds is reached.

Series T5/T8 – Series that pays out an annual 5% or 8% monthly cash flow on commission-based series.

Additional fund series available at mackenzieinvestments.com/fundcodes

To learn more about the [Mackenzie Betterworld Global Equity Fund](#), speak to your advisor or your Mackenzie sales team.

¹ Mackenzie Betterworld portfolios exclude companies that derive at least 10% of their revenues from the exploration, extraction, or production of thermal coal, oil sands, shale energy, arctic oil and gas.

² In addition to the firmwide exclusions of anti-personnel landmines and cluster munitions, all sustainable investment solutions including Mackenzie Betterworld portfolios exclude companies that derive at least 10% of their revenues from the following unsustainable industries: adult entertainment, controversial weapons, gambling, tobacco, private prisons. To learn more about our exclusions, see our Sustainable Investing Policy.

Commissions, trailing commissions, management fees, and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

The content of this brochure (including facts, views, opinions, recommendations, descriptions of or references to, products or securities) is not to be used or construed as investment advice, as an offer to sell or the solicitation of an offer to buy, or an endorsement, recommendation or sponsorship of any entity or security cited. Although we endeavour to ensure its accuracy and completeness, we assume no responsibility for any reliance upon it.

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