

Mackenzie Greenchip Global Environmental Balanced Fund

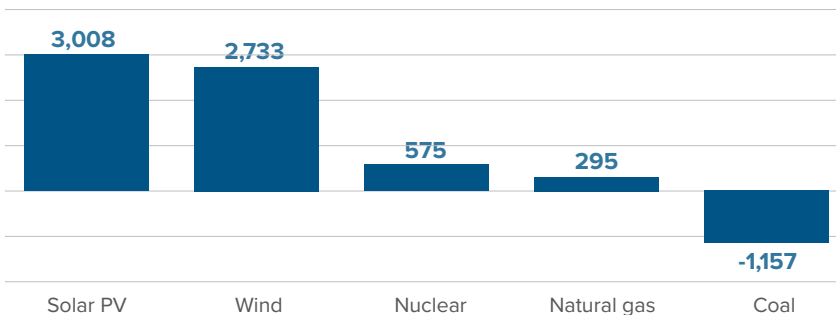
Make a difference to the environment and your portfolio

Investing in companies that are powering a green future

Investments aimed at tackling climate change are growing significantly. However, to achieve net-zero emissions by 2050, the annual investment in clean energy will need to more than triple to an estimated US\$4.5 trillion¹ by 2030. Investors are keen to use their investment dollars to help fight climate change. In fact, 65% of investors want their financial services provider to inform them about sustainable investments.²

Expected change in electricity generation

By source between 2021 and 2030



Units: TWh. In 2019, Canada's total generation was 632 TWh (Source: <https://www.cer-rec.gc.ca/en/data-analysis/canada-energy-future/2021electricity/index.html>). Source: IEA, World Energy Outlook 2022. According to the "Stated Policies Scenario", which amalgamates current policy targets by global governments.

Experts with the track record and truly green credentials

The fund's equity sleeve is managed by the Mackenzie Greenchip Team, a pre-eminent Canadian investment management team that has focused exclusively on environmental-themed investing since 2007. The fixed income sleeve is managed by the Mackenzie Fixed Income Team, an early adopter of the six UN Principles for Responsible Investment. The team has embedded ESG factors into its investment process since it began managing fixed income within the Mackenzie Global Sustainable Balanced Fund in 2017.

Why invest in this fund?

- Balanced approach**
combines equities of companies focused on environmental solutions and green bonds that are at the forefront of financing a sustainable future.
- Diversification benefits**
from a portfolio that will have low resemblance to many investor portfolios.
- The great energy transition**
creates investment opportunities that bring a positive impact without sacrificing returns.

MANAGED BY

Mackenzie Greenchip Team

John A. Cook, CIM

SVP, Portfolio Manager, Team Co-Lead
Industry start: 1991

Gregory Payne, PhD, CFA

SVP, Portfolio Manager, Team Co-Lead
Industry start: 1999

Mackenzie Fixed Income Team

Konstantin Boehmer, MBA

SVP, Portfolio Manager, Head of Fixed Income
Industry start: 2003

Mackenzie Multi-Asset Team

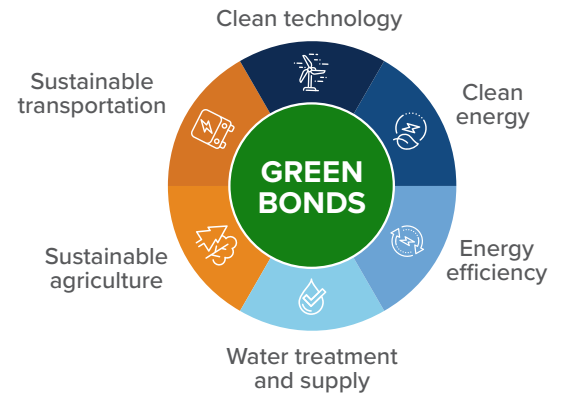
Nelson Arruda, MFin, MSc, CFA

SVP, Portfolio Manager,
Head of Multi-Asset Team
Industry start: 2010

An all-encompassing opportunity

The equity team seeks blue-chip green economy businesses in the sparsely covered environmental sector. This is combined with a fixed income sleeve that seeks green bonds and debt instruments that finance environmental and sustainable solutions. As a result, the fund provides investors with a unique mix of growth and stability potential, including the secular tailwind towards the great energy transition.

Securities held in the fund



Fund codes and management fees

Series	Prefix	C\$				Mgmt fee %
		FE*	BE*	LL2*	LL3*	
A	MFC	8258	8259	7307	8260	1.90%
F	MFC	8262				0.75%
FB	MFC	8265				0.90%
PW	MFC	8268				1.75%
PWFB	MFC	8269				0.75%
T5	MFC	8276	8277	7308	8278	1.90%
T8	MFC	8279	8280	7309	8281	1.90%

* 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, redemption charge 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.



For information on performance, holdings, fund codes and more, view the fund details or scan the QR code.

To learn more about the Mackenzie Greenchip Global Environmental Balanced Fund, speak to your advisor or your Mackenzie sales team.

1 Source: International Energy Agency

2 RIA: "Investor Opinion Survey 2023".

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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