

# Mackenzie Greenchip Team

Investing in companies that are powering a green future

At Mackenzie Greenchip, we have an exclusive focus on companies whose revenues are generated selling environmentally superior products and services.

These generally fit into six sectors:

- |                           |                            |
|---------------------------|----------------------------|
| 1. Clean renewable energy | 4. Water                   |
| 2. Energy efficiency      | 5. Sustainable agriculture |
| 3. Clean-up technologies  | 6. Transportation          |

We believe that within the environmental space, there are extraordinary opportunities for investors, as new forms of energy and energy-efficient equipment and processes emerge, and are adopted worldwide. That said, we invest in long-term solutions and not short-term hype. With a careful approach, we wait until innovations are proven and economically viable without government subsidies.

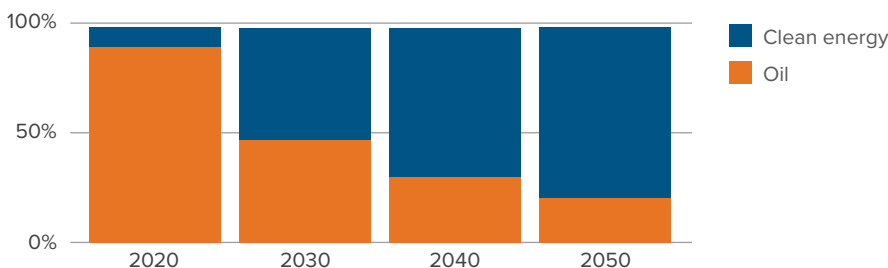
## Clean energy is vital to the planet and to your portfolio

While billions of dollars are being invested in responsible funds, very little of that capital is getting to the companies that actually need it to create the energy solutions that will save our planet. We are 100% invested directly in companies worldwide that are revolutionizing the way energy is made and consumed.

We believe there are exceptional opportunities for investors who are on the right side of the energy transition.

### Clean energy is expected to surpass oil as our primary energy source by 2030

Global market, IEA net-zero scenario



Source: International Energy Agency

## THE MACKENZIE PLUS

### Finding value in a growth space

Seeking long-term value, seeing beyond the hype

### Uncovering “best ideas” worldwide

All-cap opportunities without borders

### Environmental changemakers

Investing in companies at the forefront of the energy transition

## Mandates

- Mackenzie Greenchip Global Environmental Balanced Fund
- Mackenzie Greenchip Environmental All Cap Fund
- Mackenzie USD Greenchip Global Environmental All Cap Fund

## Finding value in a growth space

Seeking long-term value, seeing beyond the hype.

Investing with integrity and purpose, we look beyond short-term growth potential. We focus on building long-term assets that we expect will have a productive return over decades. That means finding value, paying the right price, understanding the risks, and seeing through the hype.

We are patient and wait to invest in an innovation until the cost curve comes down, so it is viable in the marketplace without government subsidies. For example, the cost of solar and wind have come down so dramatically that they are now the cheapest ways to generate new energy.

## Uncovering “best ideas” worldwide

All-cap opportunities without borders.

At Mackenzie Greenchip, we are open to opportunities anywhere in the world. We find that many of the most compelling opportunities reside outside of the U.S. and Canada. Since inception, we have generally been overweight in Asia and Europe.

We are overweight industrials, utilities, and materials, as we provide much-needed capital to companies making wind turbines or solar panels, or helping existing technologies become more efficient. Our approach dramatically underweights the financial services, health care, and consumer discretionary sectors. Since we invest differently than the global equity benchmark, our funds are ideal for adding diversification to a balanced global portfolio.

## Environmental changemakers

Investing in companies at the forefront of the energy transition.

We invest directly in companies that are developing renewable energy and clean technology, building a sustainable future for us all. We have a sliding-scale revenue requirement for inclusion in the portfolio:

Company's total revenue	Revenue from environmental products and services
Over \$1 billion	20%
Over \$100 million	50%
Less than \$100 million	100%

These companies include makers and distributors of new forms of energy, such as solar, wind, batteries, biomaterial and beyond; infrastructure; clean technology; and energy efficient equipment and processes. Today and over the coming decades, this much-needed innovation will change the way our world works—from transportation to agriculture to industry.

## Why Mackenzie

Our mission is to create a more invested world together, so that all Canadians can be better off.

## Invested in the future, together

We build unshakeable relationships with advisors to help investors reach their potential through a broad range of innovative investment solutions for all investor needs. We're committed to investing in a responsible, sustainable future, while making investments easier to understand.

## Specialist expertise and solutions

Mackenzie offers a choice of multiple investment boutiques — specialist teams that pursue distinct strategies and opportunities.

## Backed by strength

Part of IGM Financial and the Power Financial Group of Companies, trusted advice champions. IGM Financial has over \$252.2B (CAD) in assets under management and advisement (AUM&A) as of March 31, 2024.

## Mackenzie Greenchip Team



### John A. Cook, CIM

Senior Vice President, Portfolio Manager, Team Co-Lead

Joined Mackenzie in 2021. Investment experience since 1991.

- John brings over 30 years of experience ranging from mutual funds, venture capital and social finance.
- Before co-founding Greenchip in 2007, John was President of MaRS Discovery District, one of Canada's largest innovation hubs. He also held a number of executive positions at Canadian mutual fund companies.
- BA from Queen's University; Chartered Investment Manager (CIM) designation.



### Gregory Payne, PhD, CFA

Senior Vice President, Portfolio Manager, Team Co-Lead

Joined Mackenzie in 2021. Investment experience since 1999.

- Greg has more than 25 years of experience in the financial industry, with over a decade focused exclusively on environmental sectors.
- Prior to co-founding Greenchip in 2007, Greg was involved in managing retail and institutional assets at a large capital management firm.
- Honours BSc in Statistics; MA and PhD in Economics from the University of Toronto.



### Johnathan Prestwich

Investment Analyst

- Johnathan had previously interned with the Mackenzie Greenchip team in the summer of 2019 and Greg was an advisor for his final year project on hydrogen technologies in 2020.
- Johnathan holds a Bachelor of Engineering and Society Degree in Mechanical Engineering from McMaster University where he graduated Summa Cum Laude.



### Rohit Bhalgat

Investment Analyst

- Prior to joining the Greenchip team in August 2023, Rohit worked as an equity research associate at two bank-owned investment dealers specializing in utilities, metals, and mining sectors.
- Rohit holds a Bachelor of Mechanical Engineering degree from Pune University and a Master of Finance degree from Texas A&M University.



### Elise Macdonald

Investment Analyst

- Elise originally started at Mackenzie as part of the Investment Management Rotational Program in August 2020, before joining the Greenchip team in November 2022.
- Elise graduated with honours from Western University with a BSc, specializing in Biology, and an HBA from the Ivey Business School.

## Fund codes and management fees

Fund name	Series	Prefix	C\$				Mgmt fee	MER*
			FE	BE**	LL2**	LL3**		
Mackenzie Greenchip Global Environmental Balanced Fund	A	MFC	8258	8259	7307	8260	1.90%	2.42%
	F	MFC	8262	–	–	–	0.75%	1.01%
	FB	MFC	8265	–	–	–	0.90%	1.31%
	PW	MFC	8268	–	–	–	1.75%	2.14%
	T5	MFC	8276	8277	7308	8278	1.90%	2.46%
Mackenzie Greenchip Global Environmental All Cap Fund	A	MFC	5782	5783	7300	5784	2.00%	2.56%
	F	MFC	5786	–	–	–	0.80%	1.06%
	FB	MFC	5789	–	–	–	1.00%	1.46%
	PW	MFC	5792	–	–	–	1.80%	2.18%
	T5	MFC	5799	5800	7301	5801	2.00%	2.60%

Fund name	Series	Prefix	US\$				Mgmt fee
			FE	BE**	LL2**	LL3**	
Mackenzie USD Greenchip Global Environmental All Cap Fund	A	MFC	7509	7510	7512	7511	2.00%
	F	MFC	7514				0.80%
	FB	MFC	7517				1.00%
	PW	MFC	7520				1.80%
	T5	MFC	7527	7528	7530	7529	2.00%

\* MER as of September 30, 2023.

\*\* 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.



**For more information about the [Mackenzie Greenchip Team](#), please contact your financial advisor.**

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.

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