



PRESS RELEASE

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NEI Introduces First Suite of Impact Funds in Canada

- Launch of NEI Global Impact Bond Fund rounds out Canada's first full suite of impact investment funds
- Suite includes fixed income, equity, balanced solutions with global reach to meet a broader range of investor needs
- Solutions provide impact reporting on environmental and social issues such as climate change, gender and racial diversity, income equality, affordable housing, and more

TORONTO, July 14, 2020 – NEI Investments (“NEI”) today announced it will bring more responsible investment options to Canadians with the launch of NEI Global Impact Bond Fund. The addition of this core fixed income fund to NEI's lineup makes NEI the first Canadian investment manager to offer an impact solution for each major asset class. Investors with different risk profiles and goals can now choose among NEI Global Impact Bond Fund (fixed income), NEI Environmental Leaders Fund (equity), and NEI Global Sustainable Balanced Fund (fixed income and equity combined).

“We are at an historic turning point for responsible investing,” said Frederick M. Pinto, SVP and Head of Asset Management for NEI Investments. “More and more, investors are seeking ways to tackle the world's most pressing challenges as they pursue their financial goals, from the effects of climate change to gender and racial diversity to corporate readiness in the face of a crippling global pandemic. The time for impact investing is now.”

NEI Global Impact Bond Fund is sub-advised by Wellington Management Canada ULC, an affiliate of Boston-based asset manager Wellington Management Company LLP (“Wellington”). Wellington has a history spanning more than 90 years, serving clients in 63 countries, and a deep commitment to responsible investing.

The fund invests in a diversified mix of high-quality government, corporate, and sovereign bonds from around the world, making it suitable as a core fixed income solution for investors. In order to be included in the fund, the bond issuers' products, services, or funding objectives must be designed to address prevalent social and environmental issues. This mandate is available to Canadian retail investors only from NEI.

“With this fund, Canadians get the rare opportunity to combine their desire to make an impact with the need for core fixed income exposure at a time when equity volatility is exceptionally high,” said John Bai, VP and Chief Investment Officer for NEI Investments. “This is a cutting-edge impact solution in the form of a foundational portfolio building block that brings materiality and measurability to the Canadian retail market, thanks to our new partnership with Wellington.”

“It has been clear throughout our dialogue that NEI and Wellington are aligned in our impact investing philosophies,” said Campe Goodman, Senior Managing Director, Partner, and Fixed Income Portfolio Manager for Wellington. “We strive to address some of the world's major social and environmental challenges while uncovering opportunities across the broad spectrum of fixed income. We intend to achieve this positive impact in addition to delivering a competitive financial outcome for Canadians.”



Key features of NEI Global Impact Bond Fund

- Invests in the debt of global companies, governments and organizations whose products and services help address some of the world's major social and environmental challenges
- High quality, core fixed income solution with a majority allocation to investment grade bonds from developed economies
- Bonds must meet proprietary impact criteria in areas such as education and job training, safety and security, affordable housing, health, and clean water and sanitation, among others
- Impact results measured against key performance indicators, giving investors insight into the positive, quantifiable difference they are making with their portfolio
- Fossil fuel free

About NEI Investments

“NEI Investments” and “NEI” refer to Northwest & Ethical Investments L.P., an Ontario limited partnership. NEI Investments 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 \$70 billion in assets. For more information please visit www.neiinvestments.com and www.aviso.ca

About Wellington Management Company LLP

Tracing their history to 1928, Wellington is one of the world's largest independent investment management firms with over US\$1 trillion in assets under management as of March 31, 2020. Wellington's comprehensive investment capabilities are built on the strength of rigorous, proprietary research and span nearly all segments of the global capital markets, including equity, fixed income, multi-asset, and alternative strategies. To better assess risks and opportunities in client portfolios, Wellington has integrated the analysis of environmental, social, and corporate governance (ESG) factors into their investment and risk-management processes firmwide. Wellington's dedicated ESG team provides their investors with proprietary research and insight to support ESG considerations, incorporating analytics, company engagement, and in-depth portfolio reviews.

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