

RESPONSIBLE INVESTING IN CANADA: A SNAPSHOT



WHAT IS RI?



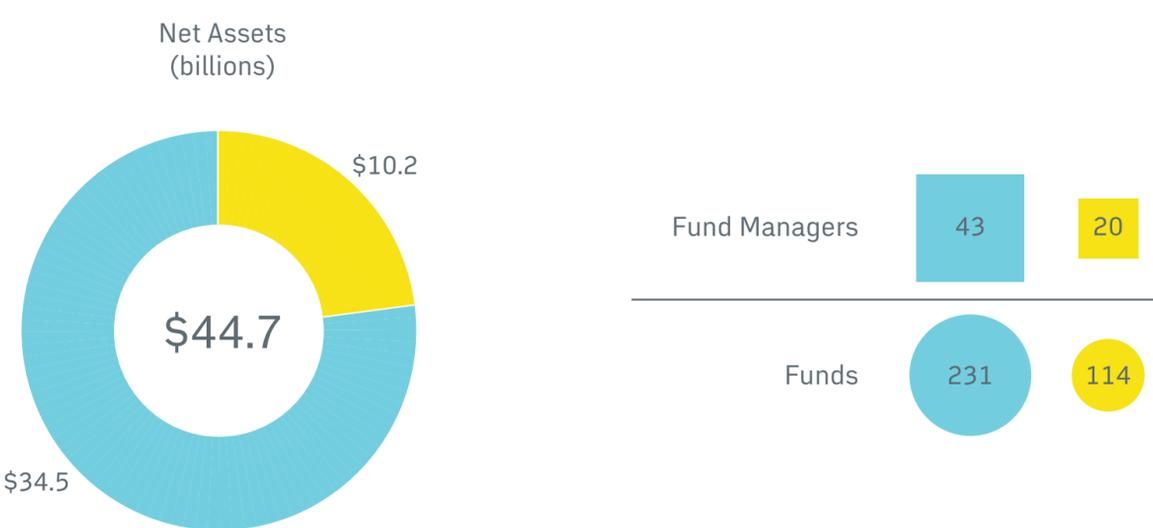
Responsible investment (RI) is an investment approach that incorporates environmental, social and governance (ESG) factors into investment decision-making and active ownership processes, in combination with traditional financial research.

EXAMPLES OF RI CRITERIA

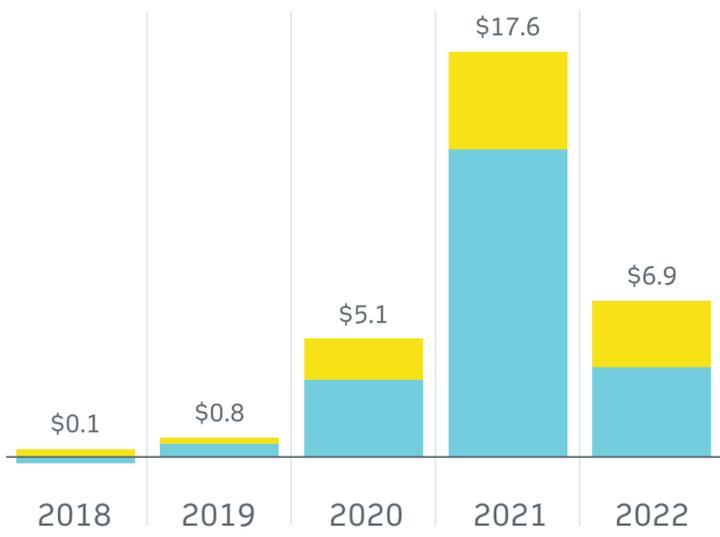


RI FUND LANDSCAPE¹

¹ Data as of December 31, 2022.



Net Sales (billions)



Source: 2022 Investment Funds Report

INVESTOR KNOWLEDGE AND SENTIMENTS



- 18% of mutual fund investors and 27% of ETF investors state that they currently own responsible investments, and a majority who do not currently own responsible investments report they are likely to include these investments in their portfolio in the future.
- The vast majority of those who have responsible investments state that they are at least somewhat likely to increase these holdings.

Source: 2022 Pollara Investor Survey

ADVISOR KNOWLEDGE

- 85% of advisors state that they are very or somewhat comfortable starting a conversation about RI
- 48% of advisors state that, in discussion with clients, RI or ESG issues come up sometimes or frequently. When RI and ESG-related conversations do happen, clients are roughly as likely to raise the topic as their advisors.



Source: 2021 RIA Advisor Survey