

Responsible Investment Funds in Canada

Highlights from Q2 2017



The Responsible Investment Association (RIA) conducts quarterly performance reviews of responsible investment (RI) funds in Canada.

Data provided by Fundata shows that Canadian RI mutual funds performed strongly in Q2 2017, with RI funds in 17 of the 18 fund classes outperforming their respective industry averages in the short, medium or long-term.

In the **Canadian Equity Balanced** fund class, all the funds outperformed in the three-month period ending June 30, 2017. All the funds with three-year and five-year track records outperformed, and nearly all the funds outperformed in the one-year period.

In the **Canadian Equity** fund class, the average return of RI funds outperformed the industry over the short, medium and long-term. Nearly two-thirds of funds in the category outperformed over the three-month and three-year periods. Nearly all the funds in the category outperformed in the one-year period. More than two-thirds of funds outperformed over the five-year period and half of the funds with a 10-year track record outperformed.

In the **Global Equity** fund class, the average return of RI funds outperformed traditional funds over short to mid-term. Two thirds of funds outperformed over the three-month period, as well as those with a one-year, three-year and five-year track record. Half of funds with a 10-year track record outperformed.

Funds in the **Canadian Neutral Balanced** category also outperformed the industry averages over the short to medium term. The vast majority of funds outperformed over the three-month period and nearly three-quarters of funds with a three-year track record outperformed. A good majority of funds outperformed over the one-year period.

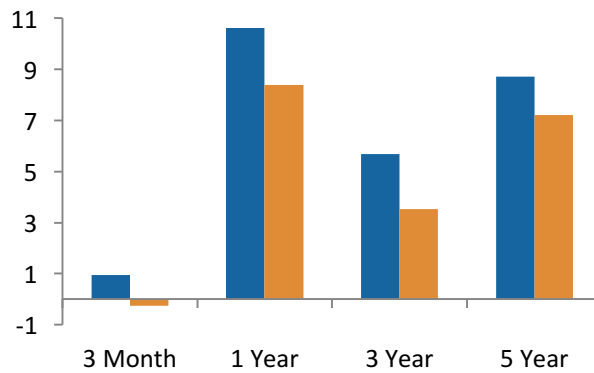
See the graphs below for a quick overview of notable RI fund performance in the second quarter of 2017.

Using environmental, social, and corporate governance (ESG) criteria to guide investment decisions often has a clear, positive impact on returns – especially for investors seeking stable, long-term performance. The data indicates that there is no penalty for making responsible investment decisions.

Average RI fund performance vs. industry averages to June 30, 2017

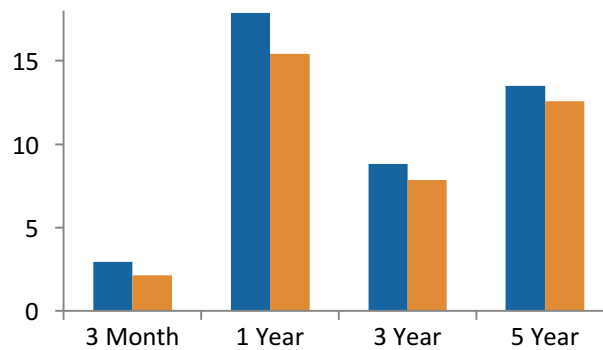
Canadian Equity Balanced

■ Average RI Canadian Equity Balanced
■ Average Canadian Equity Balanced



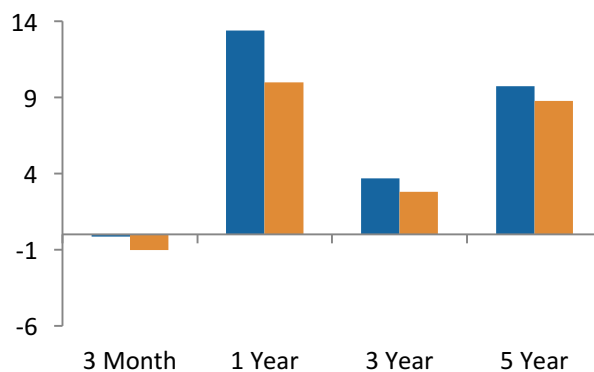
Global Equity

■ Average RI Global Equity
■ Average Global Equity



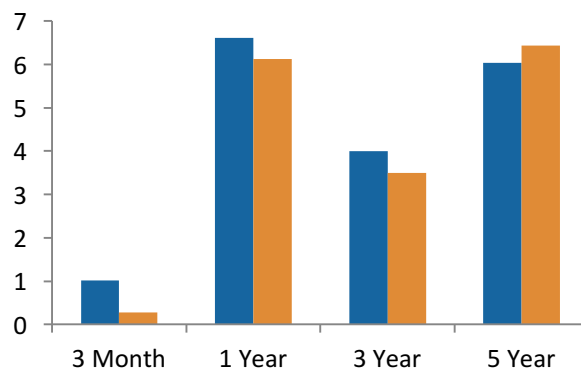
Canadian Equity

■ Average RI Canadian Equity
■ Average Canadian Equity



Canadian Neutral Balanced

■ Average RI Canadian Neutral Balanced
■ Average Canadian Neutral Balanced



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