









Launched in 1991,¹ the AGF Global Sustainable Growth Equity Strategy is thematic, investing in companies that provide products or services that are potential solutions for the sustainability issues facing the world.

It is becoming increasingly more important for countries and companies to deal with pollution and environmental factors, with an eye toward future sustainability. Companies with innovative environmentally focused solutions are poised to benefit from this changing landscape.

Environmental themes

The AGF Global Sustainable Growth Equity Strategy offers investors access to four mega themes that provide an investment framework, through which to identify attractive opportunities. As a result of this process, the portfolio manager does not invest in certain sectors, such as fossil fuel producers.

20 Years of identifying high-growth thematic opportunities

			
ENERGY AND POWER TECHNOLOGIES	WASTE MANAGEMENT AND POLLUTION CONTROL	WATER AND WASTEWATER SOLUTIONS	ENVIRONMENTAL HEALTH AND SAFETY
<ul style="list-style-type: none"> • Alternative energy production • Low emission vehicles • Smart lighting • Energy management • Automation and process control 	<ul style="list-style-type: none"> • Recycling • Waste service • Emissions control 	<ul style="list-style-type: none"> • Water treatment • Water infrastructure • Irrigation 	<ul style="list-style-type: none"> • Healthy living • Sustainable food • Infrastructure integrity • Safer products
			

Investment philosophy

WE BELIEVE:	THEREFORE WE:
1 The world is transitioning to a sustainable economy.	Invest in four broad themes that position the portfolio to benefit from the transition to a sustainable economy.
2 Industries evolve according to powerful themes – not GICS.	Are GICS-agnostic in our approach and invest in companies offering solutions to key issues of sustainability.
3 Markets are short-sighted and become <i>reactive</i> to themes.	Analyze and <i>proactively</i> invest in themes and position the portfolio to exploit this inefficiency.



MARTIN GROSSKOPF, MES, MBA
Vice-President and Portfolio Manager
AGF Investments Inc.
Industry Exp: 1994 / Firm Exp: 2000

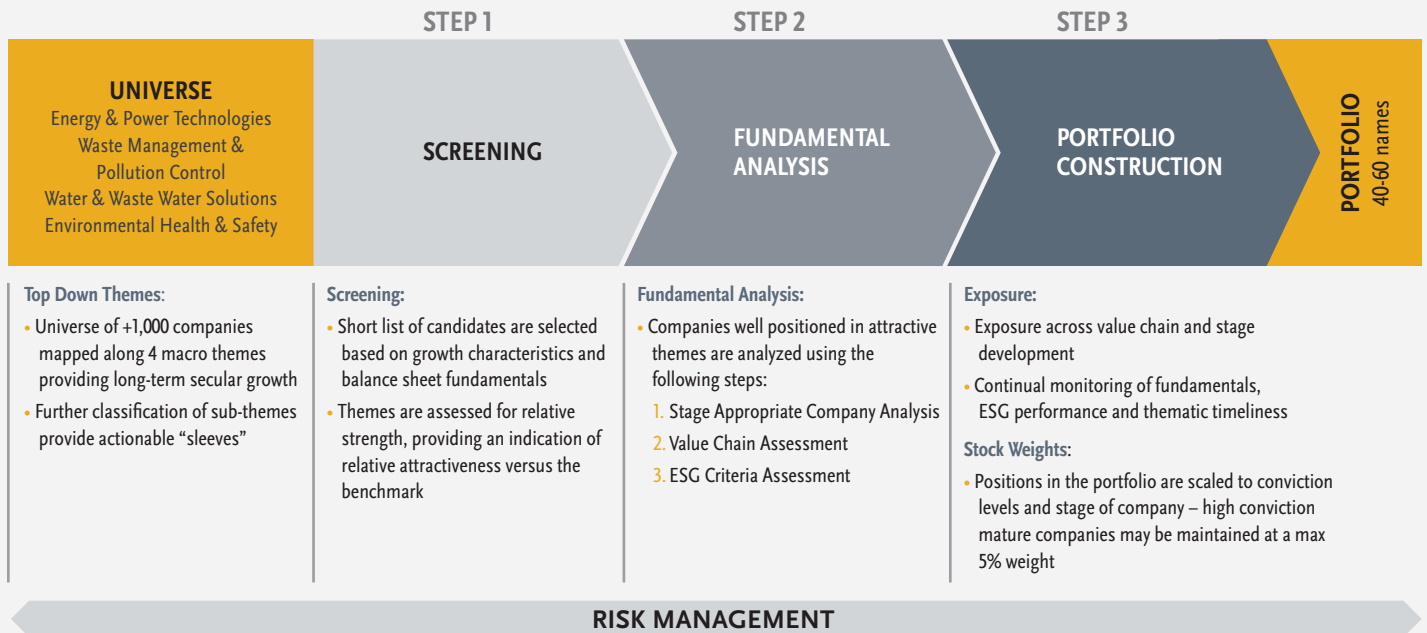
- Has over 20 years of experience in financial and environmental analysis
- Provides input on ESG issues across the AGF teams
- Was project manager with CSA International from 1997 to 2000, and prior to that was an Environmental Scientist with Acres International Limited
- Masters of Environmental Science and a Master of Business Administration, both from York University



HYEWON KONG, M.SC., CFA
Associate Portfolio Manager
AGF Investments Inc.
Industry Exp: 2005 / Firm Exp: 2014

- Has more than 10 years of international investment experience in global equities focusing on environmental and social impact themes and ESG integration
- Previously, Senior Analyst at WHEB Asset Management and Associate Fund Manager at Henderson Global Investors, both in the U.K.
- M.Sc. from Oxford University, a CFA Charterholder and a member of the Toronto CFA society
- Responsible Investment Association (RIA) RI Week advisory board member
- Provides input on ESG issues across the AGF teams

Investment Process



*Consideration of volatility impact occurring from stage of maturity, market cap, sensitivities and relative weights within the portfolio. Please see the full disclaimer.

Why invest in the AGF Global Sustainable Growth Equity Strategy?

- Provides access to high-growth opportunities in environmental themes in energy, waste, water and health care
- Offers a disciplined thematic approach to investing
- A track record of more than 20 years
- Managed since 2000 by a portfolio manager with a deep background in environmental consulting

For more information, contact your AGF representative or visit AGF.com/institutional.



¹ Effective March 1, 2012, Acuity Funds Ltd. amalgamated with its affiliate AGF Investments Inc. The amalgamated entity, AGF Investments Inc., continues as the manager of the Strategy previously managed by Acuity Funds Ltd. The Strategy was renamed from Acuity Clean Environment Equity Fund, effective April 19, 2012 to AGF Clean Environment Fund, available to retail investors. The AGF Global Sustainable Growth Strategy is managed by the same portfolio manager and is available to Institutional investors.

Effective April 17, 2015, Acuity was deregistered and was removed from AGF Investments. The clients and assets managed under Acuity have been transferred to AGFI. The firm definition was updated to reflect this event and the change has no impact on the data of this presentation.

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AGFA is a registered advisor in the U.S. AGFI is registered as portfolio managers across Canadian securities commissions. AGFIA is regulated by the Central Bank of Ireland and registered with the Australian Securities & Investments Commission. AGF AM Asia is registered as a portfolio manager in Singapore. The subsidiaries that form AGF Investments manage a variety of mandates comprised of equity, fixed income and balanced assets.

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