

Responsible investment and our OP4+ process



Responsible investment refers to the incorporation of ESG factors into the selection and management of investments.



Environmental



Social



Governance

The advantages of an open architecture

Thanks to its open architecture, NBI can select portfolio managers with the highest standards in responsible investment.

A rigorous process

The selection and ongoing review of portfolio managers are based on our OP4+ process, where the organization, the people, the process, the performance, and ESG integration are assessed.

The + pillar

The +, or ESG, pillar assesses the responsible investment practices of managers according to six criteria:

- 1 Signatory of the United Nations Principles for Responsible Investment (or similar organizations)
- 2 Incorporation of ESG criteria for value creation and risk management
- 3 Resources dedicated to responsible investment
- 4 Proxy voting and engagement in line with investment objectives
- 5 Measures and targets for portfolio footprint
- 6 Stewardship activities

Why integrate ESG factors?

- › To better evaluate business risks and opportunities.
- › To complement traditional financial analysis.
- › To generate better risk-adjusted returns.



¹ As at April 30, 2023. Principles for Responsible Investment (PRI) signatories commit to measure and report on their responsible investment activities.

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Our commitments

Signatory of:



Member of



nbinvestments.ca



Open architecture.
Endless opportunities.

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National Bank Investments is a signatory of the United Nations-supported Principles for Responsible Investment, member of Canada's Responsible Investment Association and a Founding Participant in the Climate Engagement Canada initiative.

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