

NBI Exchange-Traded Funds

Whether you're seeking to diversify your investments or to seize investment opportunities in different markets and sectors, NBI ETFs can likely complement your portfolio based on your needs.

ETFs in a nutshell



An easy way to diversify a portfolio

- ETFs are composed of a basket of stocks, bonds or other financial products.
- They cover a wide range of asset classes, sectors, geographies, and strategies.



The trading convenience of stocks

- ETFs are listed on regulated stock exchanges.
- Their prices change intraday.
- They can be bought on margin or sold short.

Types of ETFs

Actively managed ETFs

Portfolios of active ETFs are managed by professionals who make investment decisions with the aim of outperforming the market rather than passively tracking a benchmark index.

Index-tracking ETFs

Index-tracking ETFs seek to replicate the performance of a benchmark index by investing in its component securities.

Alternative ETFs

Alternative ETFs can invest in securities other than stocks and bonds or employ long and short trading strategies. Adding alternative strategies to a traditional portfolio provides this potential. They offer the ability to mitigate market volatility and enhance portfolio diversification.

Five reasons to invest in ETFs

→ 1. Diversification

Exposure to a wide range of securities can reduce volatility and offer increased protection against market downturns.

→ 2. Transparency

Information on an ETF current price and underlying holdings is easily accessible and updated frequently.

→ 3. Liquidity

Buying and selling ETFs is relatively simple, as they are traded on regulated exchanges.

→ 4. Cost effectiveness

The relatively low management fees they charge enable investors to capture the maximum potential returns.

→ 5. Tax efficiency

ETFs can be held in registered accounts and allow investors to use tax loss selling strategies when held in non-registered ones.

Understanding ETFs and ETF series

- An ETF series is simply an additional series of a mutual fund.
- ETF series typically have the same management fee as their F series mutual fund trust counterparts.
- ETF series can allow investors who don't have access to F series mutual funds to invest in actively managed strategies.
- An ETF series can benefit from reduced fixed costs through the economies of scale achieved by managing multiple series of a single fund.
- In the case of an ETF series based on an existing mutual fund strategy, its historical performance is available to investors.
- ETFs and ETF series can greatly simplify tax reporting for investors since tax slips are issued by their dealer rather than by each individual mutual fund manufacturer.
- There is no investment minimum for ETFs or ETF series, but unlike with mutual funds, investors cannot set up systematic withdrawal plans or preauthorized contributions.

nbinvestments.ca/etf

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