

# 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 practices are assessed.

## The + pillar

The +, or ESG, pillar assesses the responsible investment practices of portfolio managers based on the 5 other pillars:

- 1 **Organization:** corporate culture fostering responsible investment, including governance, strategies, and policies guiding RI.
- 2 **People:** ESG expertise within investment teams, supported by dedicated ESG resources.
- 3 **Process:** Investment process that systematically incorporates ESG factors and shareholder engagement.
- 4 **Portfolio:** Consistency between portfolio construction and ESG integration process.
- 5 **Performance:** Measurement and management of the portfolio's main ESG risks.

## Why integrate ESG factors?

- › To benefit from long-term value creation opportunities.
- › To complement traditional financial analysis.
- › To better manage risks arising from ESG issues.



<sup>1</sup> As of April 30, 2024, Principles for Responsible Investment (PRI) signatories commit to measure and report on their responsible investment activities. Source: National Bank Investments and UN PRI.

# Responsible investment and our **OP4+** process



## Our commitments

Signatory of:



Member of



[nbinvestments.ca](https://nbinvestments.ca)



**Open architecture.**  
**Endless opportunities.**

The information and the data supplied in the present document, including those supplied by third parties, are considered accurate at the time of their printing and were obtained from sources which we considered reliable. We reserve the right to modify them without advance notice. This information and data are supplied as informative content only. No representation or guarantee, explicit or implicit, is made as for the exactness, the quality and the complete character of this information and these data. The opinions expressed are not to be construed as solicitation or offer to buy or sell shares mentioned herein and should not be considered as recommendations.

© National Bank Investments Inc., 2024. All rights reserved. Any reproduction, in whole or in part, is strictly prohibited without the prior written consent of National Bank Investments Inc. The information and opinions herein are provided for information purposes only and can be modified without prior notice.

© NATIONAL BANK INVESTMENTS is a registered trademark of National Bank of Canada, used under licence by National Bank Investments Inc.

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.