

# Scotia Global Funds

*A tradition of investment stewardship*



## Managed by leaders in global investment management

Scotia Global Funds are managed by JFL Global Investment Management (JFL Global), a wholly owned subsidiary of Scotiabank. JFL Global is one of Canada's leading investment firms that is widely recognized and valued for its core strengths:

- Fundamental, high-quality investing
- Rigorous in-house global research
- Active, bottom-up investing for more than six decades
- Strict investment criteria to assess quality and manage risk
- Focus on global leaders, non-cyclical businesses
- Long-term ownership approach
- Provides expert management counsel as a trusted shareholder
- Long history of governance advocacy

## Scotia Global Funds – At a glance

	Scotia Global Corporate Bond Fund	Scotia Global Opportunities Equity Fund
<b>Asset class</b>	Corporate fixed income	Global equity
<b>Benchmark</b>	Bloomberg Barclays US Corporate Index	MSCI World Index
<b>Portfolio manager</b>	JFL Global Investment Management	JFL Global Investment Management
<b>Recommended time horizon</b>	Medium to long	Long
<b>Objective</b>	Income	Growth
<b>Risk rating</b>	Low to medium	Medium to high

## What distinguishes the Portfolio Manager?

For over six decades, JFL Global Investment Management (JFL Global) has invested in quality businesses and advocated for good corporate governance. Environmental, Social and Governance (ESG) factors are integrated into the Portfolio Manager's fundamental analysis, and complemented by active engagement with investee companies to help create long-term shareholder value.

Understanding JFL Global’s Investment Approach

- **Integrate ESG factors into investment decisions.** We believe what is material to a business’s future success may be different than what has driven past performance.
- **Be engaged investors.** We fully integrate governance practices into our investment process through proxy voting and by engaging with management and board leadership to improve ESG practices material to long-term sustainable value creation.
- **Encourage disclosure of information.** We believe that transparency and accountability contribute to the quality and ethics of management and can drive excellence.
- **Collaborate with the leading global organizations.** To advance ESG-focused investment practices for the benefit of all stakeholders, our analysis factors in insights from organizations like Principles for Responsible Investment (PRI), Canadian Coalition for Good Governance (CCGG), Sustainable Accounting Standards Board (SASB), Global Initiative for Sustainability Ratings (GISR), and CDP (formerly Carbon Disclosure Project).

Scotia Global Funds are intended for investors who want:

High-quality investments

Long-term ownership in companies with highly defensible competitive advantages and quality management

Principled leadership

Hold businesses accountable by integrating proxy voting into the investment process

Active management

An actively managed and diversified portfolio of well-run businesses



Global investments

A diversified portfolio of global businesses that integrates a robust risk management

Integrated risk analysis

Investment decisions driven by traditional financial factors and ESG-related factors

Positive change

Use ownership stakes to influence issuer (fixed income) and company (equity) activities and behaviours

Contact your Relationship Manager to learn more about Scotia Global Funds.

Scotia Global Asset Management.

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