



BATIRENTE

**Leader in  
responsible  
investing**



**My retirement.  
Our strength.**





The integration of environmental, social and governance (ESG) factors is at the heart of our investment process; this allows us to provide long-term added value to our members, while generating a positive social impact and contributing to the well-being of our planet.

#### EXAMPLES OF ESG FACTORS



##### Environmental

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- › Climate change › Resource depletion
- › Waste material › Pollution
- › Deforestation



##### Social

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- › Human rights › Modern slavery
- › Child labour › Working conditions
- › Labour relations



##### Governance

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- › Corruption › Executive compensation
- › Board of directors' diversity and structure › Lobbying and contributions to political parties › Tax strategy

# The 4 pillars of responsible investing at Bâtirente

## Invest

**We take ESG factors into account in our investment decisions.**

By applying environmental, social, and governance (ESG) factors to the investment process, it's possible to identify and assess challenges that companies may face. Therefore, to select the best-prepared companies to address these challenges, our portfolio managers include ESG considerations related to the industry of the companies under consideration in their analysis.



## Engage

**We engage with the companies in which we invest to encourage them to adopt sustainable business models, and we encourage financial regulators to raise the requirements to foster these models.**

We make significant efforts to engage in positive dialogues with the companies in which we invest. These dialogues are carried out by *Æquo*, Shareholder Engagement Services, a company that we cofounded in 2015.

## Measure

**We demand greater transparency from companies and require them to disclose information relevant to ESG issues.**

Access to information is the very foundation of effective risk management related to sustainable development issues. To follow its own convictions, Bâtirente was one of the first signatories of the Montréal Carbon Pledge, launched in 2014. This pledge commits institutional investors to disclose the carbon footprint of their investment portfolio.



## Cooperate

**We cooperate with local and global financial communities to develop responsible investing and to foster dialogue and the sharing of best practices.**

### EXAMPLES OF COLLABORATION





## 3 myths about responsible investing

### Myth

**Responsible investing is less profitable than traditional investing.**

### Reality

Studies have shown that responsible investing can be just as profitable as traditional investing, or even more profitable in the long term. Companies with sustainable practices may be better able to withstand economic and environmental shocks while offering better long-term stability.

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### Myth

**Responsible investing only focuses on the environment.**

### Reality

Responsible investing encompasses environmental, social, and governance (ESG) factors. Therefore, investors also consider social issues such as human rights, working conditions, diversity and inclusion, as well as governance issues such as transparency and corporate responsibility.

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### Myth

**Responsible investing is only about excluding certain companies.**

### Reality

Responsible investing is much more than just excluding certain companies. It can also involve engaging in dialogue with companies, such as an oil company, to improve their environmental, social, and governance (ESG) practices, and investing in companies that already operate within a strong ESG framework.



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