

## MD Financial Management Inc. updates website content to clarify environmental, social and governance (ESG) criteria

### MD Financial Management Inc. (MD) has amended certain content on its website

**OTTAWA, June 30, 2023:** MD has amended certain content on its website to clarify that ESG criteria and factors are considered only by MD funds that incorporate ESG factors as part of their investment strategies. Schedule A shows a list of specific websites that were amended.

The investment strategies of the MD funds can be found in the Simplified Prospectus. No amendments were made to the Simplified Prospectus or Fund Facts of the MD funds as a result of the amended content on the website. Each of the MD funds continues to exclude from its portfolio securities of companies that manufacture tobacco or tobacco-related products or whose primary business is cannabis or cannabis-related products.

When read in conjunction with the ESG Considerations section in the Simplified Prospectus disclosure, the previous content on the MD website provided the investor with an understanding of which MD funds considered ESG factors. The updated content on the website provides additional clarity. The updates to the website were requested by the Staff of the Ontario Securities Commission in connection with the Staff's ESG-focused review.

The following list includes all MD funds that do not consider ESG factors as part of their investment strategies as disclosed in the Simplified Prospectus:

#### **Name of Fund**

MD Bond Fund  
MD Short-Term Bond Fund  
MD Money Fund  
MD Strategic Yield Fund  
MD Strategic Opportunities Fund  
MD Precision Conservative Portfolio  
MD Precision Balanced Income Portfolio™  
MD Precision Moderate Balanced Portfolio™  
MD Precision Moderate Growth Portfolio™  
MD Precision Balanced Growth Portfolio™  
MD Precision Maximum Growth Portfolio™

#### **Name of Fund**

MDPIM Short-Term Bond Pool  
MDPIM Bond Pool  
MDPIM Strategic Yield Pool  
MDPIM Strategic Opportunities Pool  
MDPIM S&P/TSX Capped Composite Index Pool  
MDPIM S&P 500 Index Pool  
MDPIM International Equity Index Pool

To learn more about MD funds, please call MD Client Services at 1 800 267-2332 or visit [md.ca](https://www.md.ca).

### **About MD Financial Management Inc.**

With more than 50 years of physician-focused experience, MD Financial Management Inc. (MD) is dedicated to providing financial peace of mind to Canada's physicians and their families, so they can enjoy what matters most to them while achieving their career and life goals. MD had more than \$53.5 billion in assets under management as of May 24, 2023. MD Management Limited was the first of the MD Group of Companies to be founded, in 1969. MD Financial Management Inc. wholly owns MD

Management Limited. MD Precision Portfolios™ are trademarks of The Bank of Nova Scotia, used under licence. MD Financial Management provides financial products and services, the MD Family of Funds and investment counselling services through the MD Group of Companies. For a detailed list of these companies, visit [md.ca](http://md.ca).

**Media inquiries**

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Schedule A

- <https://mdm.ca/investing/responsible-investing-esg>
- <https://invested.mdm.ca/making-responsible-investing-the-norm>
- <https://mdm.ca/investing/responsible-investing-esg/responsible-investing-policy>
- <https://invested.mdm.ca/episode-23-responsible-investing-is-part-of-our-investment-management-process/>