



E D G E P O I N T

PRESS RELEASE

EdgePoint Wealth Management Inc. updates website content to clarify environmental, social and governance (ESG) considerations

TORONTO, September 1, 2023 – EdgePoint Wealth Management Inc. (EdgePoint) has amended content on its website to clarify that ESG factors are one of many considerations when making investment decisions for clients including its publicly offered mutual funds. ESG factors are not determinative to the investment decision making process. The updates to the website were requested by the Staff of the Ontario Securities Commission following the Staff's ESG-focused review of publicly offered mutual funds in Ontario.

The May 26, 2023 simplified prospectus of EdgePoint's publicly offered mutual funds listed below already provides disclosure to investors on the limited role that ESG considerations play in the investment decision-making process of the funds.

- EdgePoint Canadian Portfolio
- EdgePoint Global Portfolio
- EdgePoint Canadian Growth & Income Fund
- EdgePoint Global Growth & Income Fund
- EdgePoint Monthly Income Portfolio

Below for ease of reference is the ESG considerations disclosure included in the May 26, 2023 simplified prospectus.

ESG Integration Approach: We integrate ESG factors as part of our investment selection process. ESG factors are one of many considerations taken into account when making investment decisions, and, since we take a holistic approach and do not employ a hierarchy of investment considerations, ESG factors are not determinative to the investment decision-making process and are considered to a limited extent. Our investment approach is not exclusionary and, as a result, we will not exclude a potential investment from a Fund solely on the basis of an ESG factor. This approach to ESG factors is part of our general investment decision process and applied across our Funds. Incorporating ESG into the investment process may also include direct engagement with companies through meetings, proxy voting, and other methods. We vote proxies in accordance with the guidelines outlined in our proxy voting policy.

ABOUT EDGEPOINT WEALTH MANAGEMENT

EdgePoint Wealth Management Inc. is an independent investment management firm based in Toronto, and owned and operated by investors.

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