

NOVEMBER 2021

SUPPLEMENTARY
APPENDICES



CANADIAN PENSIONS DASHBOARD FOR RESPONSIBLE INVESTING

A NAVIGATIONAL TOOL TO INCREASE AMBITION FOR A SUSTAINABLE, INCLUSIVE FUTURE

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The Natural Step Canada is a national charity with over 25 years of experience advancing science, innovation and strategic leadership to foster a strong and inclusive economy that thrives within nature's limits. We achieve this by engaging thought leaders from industry, government, academia and civil society through solution labs, coalitions and expert networks such as the Canada Plastics Pact, Circular Economy Leadership Canada, and the Energy Futures Lab.

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Corporate Knights is a media and ratings organization dedicated to advancing an economy that works for people and the planet.

corporateknights.com

The Trottier Family Foundation is a private Montreal-based foundation and one of Canada's leading funders in solutions that mitigate climate change, including initiatives that strengthen the sustainable finance ecosystem.

trottierfoundation.com

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Disclaimer: The authors take all responsibility for the content of the report. Expert Advisory Panel members are acting in a personal capacity to help guide this initiative to achieve positive impact. Their involvement does not necessarily imply their agreement or endorsement of all aspects of the report's content. The views expressed do not necessarily represent the views of The Trottier Family Foundation.

Please send any feedback (including errors and omissions) to Matt Malinsky, Research Analyst, Corporate Knights at: matthew@corporateknights.com



5. APPENDICES

5.1 LIST OF FUND NAMES

Funds	Full Form of Names
AIMCO	Alberta Investment Management Corporation
BCIMC	British Columbia Investment Management Corporation
CDPQ	Caisse de dépôt et placement du Québec
CPCP	Canada Post Corporation Pension Plan
CPPIB	Canada Pension Plan Investment Board
HOOPP	Healthcare of Ontario Pension Plan
OMERS	Ontario Municipal Employees Retirement System
OPB	Ontario Pension Board
OPTRUST	Ontario Public Service Employees Union (OPSEU) Pension Plan Trust Fund
OTPP	Ontario Teachers' Pension Plan
PSP	Public Sector Pension Investment Board
VEST	Vestcor Investment Management Corporation

5.2 DETAILED METHODOLOGY

5-year annualized rate of return: A quantitative measure of a fund's annual rate of return (net-nominal) performance averaged over a five-year period, expressed as a percentage. Sourced from the most recent published annual report. If the measure is not disclosed, marked as ND.

Sustainable solutions definition: A qualitative measure of a fund's approach to measuring sustainable investments. Current pension fund practice in Canada for defining "sustainable solutions" ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings, and certified sustainable forestry. Examples of external taxonomies for "sustainable solutions" include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy, which integrates the CBI and EU taxonomies alongside sustainable social solutions (such as affordable medicine). Definitions of solutions were retrieved from annual reports, sustainability reports, responsible investing reports, and fund websites. If no definition or reference to solutions is provided, marked as ND.

Total assets under management (AUM): A quantitative measure of the total market value of the investments that a fund is managing, sourced from the most recent published annual report. Measured in Canadian dollars.

AUM by asset class: A quantitative measure of the total market value of the investments within each fund's reported asset class, sourced from the most recent published annual report. Measured in Canadian dollars.

AUM in solutions: A quantitative measure of the total market value of the investments in solutions, including breakdowns within each fund's reported asset class (if reported), sourced from the most recent published annual/sustainability report. Measured in Canadian dollars. If the measure is not disclosed, marked as ND.

% AUM in solutions: A quantitative measure of the total market value of AUM in solutions divided by the total market value of all AUM, expressed as a percentage. If the measure is not disclosed, marked as ND.

Carbon footprint metric definition: A qualitative measure of the disclosed definition for measuring the carbon footprint of a funds portfolio, sourced from annual reports, sustainability reports, and fund websites for the most recent fiscal year. If the measure is not disclosed, marked as ND.

Fund carbon footprint: A quantitative measure of the carbon footprint of the fund's total portfolio, also listed by asset class if disclosed by the fund. Calculated based on the carbon footprint metric definition provided by the fund. Expressed in tonnes of carbon dioxide equivalent per million dollars (Canadian) invested (tCO₂e/\$M). Sourced from annual reports, sustainability reports, and fund websites for the most recent fiscal year. If the measure is not disclosed, marked as ND.

% of assets covered by the carbon footprint metric: A quantitative measure of the percentage of total AUM that is covered by the reported carbon footprint of the fund, expressed as a percentage. Sourced from annual reports, sustainability reports, and fund websites for the most recent fiscal year. If the measure is not disclosed, marked as ND.

% of E&S shareholder resolutions supported: A quantitative measure of the number of environmental and social shareholder resolutions that were supported by the fund in the most

recent fiscal year. Calculated as the total number of E&S resolutions supported divided by the total number of E&S resolutions voted on. Both the numerator and denominator need to be reported, otherwise marked as ND. Sourced from annual reports, sustainability reports, and proxy voting documents.

Sustainability pay link: A qualitative measure, the sustainability pay link is a mechanism to link the remuneration of any member of a company's top-tier executive team with the achievement of environmental or social sustainability performance targets.

Value of disclosed holdings: A quantitative measure of the market value of the disclosed public equity holdings. Must include the name and total market value of the investment in the portfolio. Sourced from the most recent public filings on the fund's website or from S&P's Capital IQ database.

Executive management gender diversity: A quantitative measure of gender diversity on the executive management team for the fund. The total number of senior executives who are not male (defined as the top-tier executives as indicated on the company website). Based on assessment of bios, names, and photos located on the current company website. Calculated as the number of non-male executives divided by the total number of executives, expressed as a percentage.

Executive management racial diversity: A quantitative measure of racial diversity on the executive management team for the fund. The total number of senior executives who are Indigenous or visible minorities according to the definition of the Canadian Employment Equity Act. Based on assessment of bios, names, and photos located on the current company website. Calculated as the number of racially diverse executives divided by the total number of executives, expressed as a percentage.

E&S board competency: A board member is determined to be E&S competent if they meet one of the following criteria:

- bio/LinkedIn page explicitly states they have experience in environmental or social sustainability
- have had executive management/board experience at/with clean-economy-focused enterprises/non-profits
- authored books or highly cited papers/journals relating to the central topics of sustainability

Competency was determined through assessment of board member bios on the current fund website and a review of LinkedIn profiles.

Supports Task Force on Climate-related Financial Disclosures (TCFD): A qualitative measure of whether a fund has publicly disclosed alignment with the TCFD. Determined through a search of the TCFD supporter database.

Investor signatory to Climate Action 100+: A qualitative measure of whether a fund is a signatory to Climate Action 100+. Determined through a search of the Climate Action 100+ signatory database.

United Nations Principles for Responsible Investments (PRI) signatory: A qualitative measure of whether a fund is a signatory to the United Nations PRI. Determined through a search of the UN PRI signatory database.

Asset allocation targets for net-zero GHG emissions and/or sustainable solutions: A measure of whether a fund has set a net-zero emissions target, including any short-, medium-, and long-term targets related to emissions or investments in sustainable solutions. Sourced from annual reports, sustainability reports, and fund websites. If the measure is not disclosed, marked as ND.

Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner: A qualitative measure of whether a fund has published a formal policy related to the alignment of lobbying activities with a just transition to the low-carbon economy (LCE). Sourced from annual reports, sustainability reports, and fund websites. If the measure is not disclosed, marked as ND.

Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner: A qualitative measure of whether a fund has published a formal policy related to climate-policy advocacy undertaken by investees that supports a just transition to the LCE. Sourced from annual reports, sustainability reports, and fund websites. If the measure is not disclosed, marked as ND.

5.3 CK CLEAN TAXONOMY

The CK Clean Taxonomies are available on the [Corporate Knights website](#).

5.4 KPI COLOUR CODING DEFINITIONS

% AUM IN SUSTAINABLE SOLUTIONS

Green	>20% of AUM or net assets invested in credibly defined solutions with exposure breakdown by asset class and entity level ¹
Yellow	1%–20% of AUM or net assets invested in solutions
Red	Not disclosed or <1% invested in solutions

ANNUAL CARBON FOOTPRINT

Green	Full fund footprint disclosed, including breakdown by major asset classes and reduction in emissions intensity by 7% per year as per EU standard to be in alignment with the Paris Agreement
Yellow	Footprint partially/fully disclosed and/or does not meet 7% per annum emissions reduction
Red	Not disclosed

NET-ZERO TARGET

Green	Formal public commitment that includes science-based interim targets and transparent reporting on an annual basis ²
Yellow	Formal public commitment, but does not include science-based interim targets and/or transparent reporting on an annual basis
Red	No commitment

ESG PAY LINK

Green	Yes, a published pay link with detail on the target and the percentage of variable compensation linked to the target ³
Yellow	Yes, a published pay link with no detail on the target
Red	No pay link

CEO-AVERAGE EMPLOYEE PAY

Green	Pay ratio <8:1 ⁴
Yellow	Pay ratio between 8:1 and 12:1
Red	Pay ratio >12:1 or not disclosed

COMPOSITE LEADERSHIP DIVERSITY

Green	Composite diversity of executives and directors >43.5% ⁵
Yellow	Composite diversity of executives and directors 21.75%–43.5%
Red	Composite diversity of executives and directors <21.75%

LEADERSHIP GENDER DIVERSITY

Green	Gender diversity of executives and directors >50%
Yellow	Gender diversity of executives and directors 25%–50%
Red	Gender diversity of executives and directors <25%

LEADERSHIP RACIAL DIVERSITY

Green	Racial diversity of executives and directors >27%
Yellow	Racial diversity of executives and directors 13.5%–27%
Red	Racial diversity of executives and directors <13.5%

% E&S RESOLUTIONS SUPPORTED

Green	Supports all E&S resolutions or provides credible rationale for why support was withheld in each case ⁶
Yellow	Discloses composite number of all E&S resolutions voted on and supported, but the percentage is less than 100% and rationale for why support was withheld is not provided for each case
Red	Does not disclose composite number of all E&S resolutions voted on and supported

BOARD E&S COMPETENCY

Green	>30% board members with E&S competency ⁷
Yellow	15%–30% board members with E&S competency
Red	<15% board members with E&S competency

5.5 TABLE CLEAN EQUITIES EXPOSURE BY FUND

Fund	Clean Public Equities Exposure ⁸
AIMCO	6.26%
BCIMC	11.20%
CDPQ	17.30%
CPCP	10.22%
CPPIB	12.65%
HOOPP	4.22%
OMERS	8.62%
OPB	ND
OPTRUST	6.81%
OTPP	9.22%
PSP	9.05%
VEST	8.02%

5.6 DASHBOARD BY PENSION FUND

AIMCO

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	6.10%	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Investment value of no/low-carbon assets in Infrastructure & Renewable Resources portfolio. The renewable resources portion of this portfolio is comprised of investments in timberland and agriculture, contributing to the removal of carbon emissions from the atmosphere.	Responsible Investing Webpage (https://www.aimco.ca/what-we-do/responsible-investing/highlights?_ga=2.23156218.1511059162.1628016498-577627485.1623771309)
Impact	Total AUM in Solutions (CDN\$)*	\$3,700,000,000	Responsible Investing Webpage (https://www.aimco.ca/what-we-do/responsible-investing/highlights?_ga=2.23156218.1511059162.1628016498-577627485.1623771309)
Impact Denominator	Total AUM (CDN\$)*	\$118,600,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$47,600,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$4,600,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$39,900,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$14,800,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)	\$3,700,000,000	Responsible Investing Webpage (https://www.aimco.ca/what-we-do/responsible-investing/highlights?_ga=2.23156218.1511059162.1628016498-577627485.1623771309)
Impact Denominator	Infrastructure AUM* (CDN\$)	\$9,600,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)		

Impact Denominator	Other Asset Class AUM* (CDN\$)	\$1,600,000,000	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Impact	Carbon Footprint Metric Definition	tCO ₂ e/M\$ - The Financed Emissions method which attributes emissions to the investor proportionate to the investor's equity and debt holdings.	2020 Responsible Investment Report (https://assets.ctfassets.net/lyt4cjmejfno/4XeSezpn4NY4uSgiaanTuM/aefa68210900feae-c67a478911f079c8/ResponsibleInvestmentReport_2019-2020.pdf) Page 38
Impact	% of Assets Covered By Carbon Footprint Metric*	60%	2020 Responsible Investment Report (https://assets.ctfassets.net/lyt4cjmejfno/4XeSezpn4NY4uSgiaanTuM/aefa68210900feae-c67a478911f079c8/ResponsibleInvestmentReport_2019-2020.pdf) Page 38
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	59	2020 Responsible Investment Report (https://assets.ctfassets.net/lyt4cjmejfno/4XeSezpn4NY4uSgiaanTuM/aefa68210900feae-c67a478911f079c8/ResponsibleInvestmentReport_2019-2020.pdf) Page 39
Impact	% of E&S Shareholder Resolutions Supported*	51%	2020 Responsible Investment Report (https://assets.ctfassets.net/lyt4cjmejfno/4XeSezpn4NY4uSgiaanTuM/aefa68210900feae-c67a478911f079c8/ResponsibleInvestmentReport_2019-2020.pdf) Page 17
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	No	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Sustainable Governance	Value of Disclosed Holdings (CDN\$)	\$16,445,219,711	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	15%	Fund Leadership Webpage (https://www.aimco.ca/who-we-are/leadership) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	23%	Fund Leadership Webpage (https://www.aimco.ca/who-we-are/leadership) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	36%	Fund Governance Webpage (https://www.aimco.ca/who-we-are/governance) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	0%	Fund Governance Webpage (https://www.aimco.ca/who-we-are/governance) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	9%	Fund Governance Webpage and LinkedIn Profiles - Roger Renaud
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	11.93	2020 Annual Report (https://annualreports.aimco.ca/2020/pdfs/AIM-Co-AR2020.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	2020 Responsible Investment Report (https://assets.ctfassets.net/lyt4cjmejfno/4XeSezpn4NY4uSgiaanTuM/aefa68210900feae-c67a478911f079c8/ResponsibleInvestmentReport_2019-2020.pdf)
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	Yes	Responsible Investing Webpage (https://www.aimco.ca/what-we-do/responsible-investing)

Sustainable Governance	PRI Signatory (Yes/No)	Yes	2020 Responsible Investment Report (https://assets.ctfassets.net/lyt4cjmejfno/4XeSezpn4NY4uSgiaanTuM/aefa68210900feae-c67a478911f079c8/ResponsibleInvestmentReport_2019-2020.pdf)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication	

BCIMC

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)* (2015-2019)	9.30%	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Investments that will benefit from the transition to a low carbon economy.	2020 BCI ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 10
Impact	Total AUM in Solutions (CDN\$)*	\$3,000,000,000	2020 BCI ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 10
Impact Denominator	Total AUM (CDN\$)*	\$199,600,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$66,600,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$20,700,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$71,200,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$28,500,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$20,000,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)	\$961,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf) - Page 4 - reached \$1.4 billion in cumulative historical participation in sustainable bonds, compared to \$439 million in fiscal 2020
Impact Denominator	Other Asset Class AUM* (CDN\$)	\$7,000,000,000	2021 Annual Report (https://www.bci.ca/wp-content/uploads/2021/07/F2021-Corporate-Annual-Report.pdf)
Impact	Carbon Footprint Metric Definition	tCO2e/M\$ - Different approaches used for different asset classes. Public equity uses WACI method.	2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 76

Impact	% of Assets Covered By Carbon Footprint Metric*	Not disclosed		
Impact	Fund Carbon Footprint* Public Equities		110.7	2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 61
Impact	Fund Carbon Footprint* Fixed Income		68.2	2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 61
Impact	Fund Carbon Footprint* Private Markets		380	2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 61
Impact	Fund Carbon Footprint* Real Estate		6.9	2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) page 61
Impact	% of E&S Shareholder Resolutions Supported*		60%	Email correspondence
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	No		2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf) - Page 12
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)		\$42,765,198,648	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)		25%	Fund Executive Management Webpage (https://www.bci.ca/who-we-are/governance/executive-management/) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)		0%	Fund Executive Management Webpage (https://www.bci.ca/who-we-are/governance/executive-management/) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)		57%	Fund Board Webpage (https://www.bci.ca/who-we-are/governance/board-of-directors/board-members/) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)		0%	Fund Board Webpage (https://www.bci.ca/who-we-are/governance/board-of-directors/board-members/) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)		14%	Fund Board Webpage and LinkedIn Profiles - Sheila Taylor
Sustainable Governance	CEO/Average Employee Pay* (Ratio)		13.25	2020 Annual Report (https://www.bci.ca/wp-content/uploads/2020/08/F2020-Corporate-Annual-Report.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes		2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf)
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	Yes		2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf)

Sustainable Governance	PRI Signatory (Yes/No)	Yes	2020 ESG Annual Report (https://www.bci.ca/wp-content/uploads/2021/06/2020-BCI-ESG-AnnualReport_Final.pdf)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	Yes****	Email correspondence
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	Yes****	Email correspondence

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

****Not a formal published policy, but the fund indicated alignment in their responses based on industry association

CDPQ

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	7.80%	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	CDPQ uses Climate Bonds Initiative criteria to define low carbon solutions investments.	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) - Page 50
Impact	Total AUM in Solutions (CDN\$)*	\$36,000,000,000	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) - Page 17
Impact Denominator	Total AUM (CDN\$)*	\$365,500,000,000	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$117,900,000,000	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$64,300,000,000	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$110,200,000,000	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)	\$15,000,000,000	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) - Page 17
Impact Denominator	Real Estate AUM* (CDN\$)	\$35,500,000,000	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$31,700,000,000	2020 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2020_rapport_annuel_en.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)	\$21,000,000,000	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) - Page 17
Impact Denominator	Other Asset Class AUM* (CDN\$)		

Impact	Carbon Footprint Metric Definition	tCO ₂ e/M\$ - The carbon footprint of an asset corresponds to its direct or indirect greenhouse gas emissions (scopes 1 and 2) converted into equivalent tons of CO ₂ as defined by GHG Protocol.	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) page 44
Impact	% of Assets Covered By Carbon Footprint Metric*	78%	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) page 44
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	49	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) page 20
Impact	% of E&S Shareholder Resolutions Supported*	Not disclosed	
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	Yes	Stewardship Investing Webpage (https://www.cdpq.com/en/investments/stewardship-investing/climate-change)
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$134,247,675,635	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	39%	Executive Committee Webpage (https://www.cdpq.com/en/about-us/governance/executive-committee) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	11%	Executive Committee Webpage (https://www.cdpq.com/en/about-us/governance/executive-committee) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	40%	Board of Directors Webpage (https://www.cdpq.com/en/about-us/governance/board-directors) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	7%	Board of Directors Webpage (https://www.cdpq.com/en/about-us/governance/board-directors) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	13%	Board of Directors Webpage and LinkedIn Profiles - Robert Tessier & Jean La Couture
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	12.27	2019 Annual Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/ra/ra2019_rapport_annuel_en.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf)

Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	Yes	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf)
Sustainable Governance	PRI Signatory (Yes/No)	Yes	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	Yes - CDPQ is one of the founding members of the UN-convened Net-Zero Asset Owner Alliance, a UN initiative that currently brings together 35 large global investors with a shared objective of achieving carbon-neutral portfolios by 2050 while focusing on the impact on the real economy.	2020 Stewardship Investing Report (https://www.cdpq.com/sites/default/files/medias/pdf/en/rid2020_rapport_investissement_durable_en.pdf) Page 25
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	Yes****	Email correspondence
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	Yes****	Email correspondence

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

****Not a formal published policy, but the fund indicated alignment in their responses based on industry association

CPCP

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	8.80%	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Investments in renewable energy	2020 Sustainability Report (https://www.canadapost-postescanada.ca/cpc/doc/en/aboutus/19592_SR_2020.pdf) Page 9
Impact	Total AUM in Solutions (CDN\$)*	\$221,000,000	2020 Sustainability Report (https://www.canadapost-postescanada.ca/cpc/doc/en/aboutus/19592_SR_2020.pdf) Page 9
Impact Denominator	Total AUM (CDN\$)*	\$29,597,000,000	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$10,802,905,000	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$1,243,074,000	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$12,756,307,000	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$2,959,700,000	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Infrastructure Solutions AUM* (CDN\$)	\$221,000,000	2020 Sustainability Report (https://www.canadapost-postescanada.ca/cpc/doc/en/aboutus/19592_SR_2020.pdf) Page 9
Impact Denominator	Infrastructure AUM* (CDN\$)	\$1,243,074,000	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 19
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)		
Impact	Carbon Footprint Metric Definition	Not Defined	
Impact	% of Assets Covered By Carbon Footprint Metric*	Not Disclosed	
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	Not Disclosed	
Impact	% of E&S Shareholder Resolutions Supported*	Not Disclosed	
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	Yes	2020 Annual Report (https://www.canadapost-postescanada.ca/cpc/doc/en/aboutus/financial-reports/2020-annual-financial-report.pdf) - Page 14

Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$11,153,566,225	Holdings Data Excel File (2020-12-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	40%	Senior Management Webpage (https://www.canadapost-postescanada.ca/cpc/en/our-company/about-us/our-leadership/senior-management-team.page?) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	20%	Senior Management Webpage (https://www.canadapost-postescanada.ca/cpc/en/our-company/about-us/our-leadership/senior-management-team.page?) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	44%	Board of Directors Webpage (https://www.canadapost-postescanada.ca/cpc/en/our-company/about-us/our-leadership/corporate-governance/directors-biographies.page) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	22%	Board of Directors Webpage (https://www.canadapost-postescanada.ca/cpc/en/our-company/about-us/our-leadership/corporate-governance/directors-biographies.page) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	44%	Board of Directors Webpage and LinkedIn Profiles - Suromitra Sanatani, Lloyd Bryant, Bernd Christmas & Jim Sinclair
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	Not Disclosed	
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	No	
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	Yes	
Sustainable Governance	PRI Signatory (Yes/No)	Yes	2020 Report to Members (https://www.cpcpension.com/db/documents/RTM_2020_Long_E.pdf) Page 10
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication	

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

CPPIB

Financial	5-year annualized rate of return (net nominal %)*	11.00%	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Internal assessment.	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf) Page 41
Impact	Total AUM in Solutions (CDN\$)*	\$65,100,000,000	Survey conducted 2021-10-05
Impact Denominator	Total AUM (CDN\$)*	\$596,353,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$175,083,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$139,444,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$142,114,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$38,078,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)	\$7,100,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf) Page 41
Impact Denominator	Infrastructure AUM* (CDN\$)	\$39,954,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)	\$67,414,000,000	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/ CPP-Investments-F2021-Annual-Report-ENG.pdf)
Impact	Carbon Footprint Metric Definition	tCO2e/M\$ - In house metric - Total carbon emissions for a portfolio normalized by the market value of the portfolio. For our carbon disclosure, we use Scope 1 and 2 GHG emissions for non-government holdings, and country-wide emissions for government-issued securities.	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/ CPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 54
Impact	% of Assets Covered By Carbon Footprint Metric*	100%	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/ CPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 53

Impact	Fund Carbon Footprint* Equity Ownership	115	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/PPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 53
Impact	Fund Carbon Footprint* Government-issued securities	432	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/PPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 53
Impact	Fund Carbon Footprint* Long-term Capital Ownership	60	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/PPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 53
Impact	% of E&S Shareholder Resolutions Supported*	76%	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/PPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 44
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	Yes	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/PPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 9
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$172,781,573,403	Holdings and Relationships Reports Webpage (https://www.cppinvestments.com/the-fund/our-investments/holdings-and-relationships) 2021-31-03
Sustainable Governance	Executive Management Gender Diversity (% non-male)	33%	Senior Management Team Webpage (https://www.cppinvestments.com/about-us/our-leadership/senior-management-team) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	20%	Senior Management Team Webpage (https://www.cppinvestments.com/about-us/our-leadership/senior-management-team) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	58%	Board of Directors Webpage (https://www.cppinvestments.com/about-us/governance/board-of-directors) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	17%	Board of Directors Webpage (https://www.cppinvestments.com/about-us/governance/board-of-directors) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	17%	Board of Directors Webpage and LinkedIn Profiles - Sylvia Chrominska & Mary Phibbs
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	8.24	2021 Annual Report (https://www.cppinvestments.com/wp-content/uploads/2021/05/PPP-Investments-F2021-Annual-Report-ENG.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	Page 49 of 2020 Report on Sustainable Investing
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	No	
Sustainable Governance	PRI Signatory (Yes/No)	Yes	2020 Report on Sustainable Investing (https://cdn2.cppinvestments.com/wp-content/uploads/2020/11/PPP-Investments-2020-SI-Report-EN-Optimized.pdf) Page 29
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	

Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication

*Most Recent Fiscal Year End

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***Holdings which are disclosed at the entity level, including value of investment

HOOPP

Financial	5-year annualized rate of return (net nominal %)*	10.29%	
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Investments in green buildings	
Impact	Total AUM in Solutions (CDN\$)*	\$7,900,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 47
Impact Denominator	Total AUM (CDN\$)*	\$104,000,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$46,547,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$13,018,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$99,808,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Real Estate Solutions AUM* (CDN\$)	\$7,900,000,000	
Impact Denominator	Real Estate AUM* (CDN\$)	\$14,477,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Infrastructure Solutions AUM* (CDN\$)		2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 47
Impact Denominator	Infrastructure AUM* (CDN\$)	\$756,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)	\$4,460,000,000	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 79
Impact	Carbon Footprint Metric Definition	Not Defined	
Impact	% of Assets Covered By Carbon Footprint Metric*	Not Disclosed	
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	Not Disclosed	
Impact	% of E&S Shareholder Resolutions Supported*	Not Disclosed	
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	Not Disclosed	

Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$50,588,224,882	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	40%	Management Team Webpage (https://hoopp.com/about-hoopp/pension-leadership/hoopp-management-team) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	0%	Management Team Webpage (https://hoopp.com/about-hoopp/pension-leadership/hoopp-management-team) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	31%	Board of Trustees Webpage (https://hoopp.com/about-hoopp/hoopp-board-of-trustees) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	0%	Board of Trustees Webpage (https://hoopp.com/about-hoopp/hoopp-board-of-trustees) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	13%	Board of Trustees Webpage and LinkedIn Profiles - Gerry Rochi & Adrian Foster
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	Not Disclosed	
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	2020 Annual Report (https://hoopp.com/docs/default-source/investments-library/annual-reports/hoopp-2020-annual-report.pdf) Page 50
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	No	
Sustainable Governance	PRI Signatory (Yes/No)	Yes	Sustainable Investing Webpage (https://hoopp.com/investments/sustainable-investing)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication	

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

OMERS

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	6.50%	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Not Defined	
Impact	Total AUM in Solutions (CDN\$)*	\$3,300,000,000	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf)
Impact Denominator	Total AUM (CDN\$)*	\$105,000,000,000	Investing Highlights Webpage (https://www.omers.com/investing-highlights)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$32,550,000,000	Investing Highlights Webpage (https://www.omers.com/investing-highlights)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$14,700,000,000	Investing Highlights Webpage (https://www.omers.com/investing-highlights)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$26,250,000,000	Investing Highlights Webpage (https://www.omers.com/investing-highlights)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$14,700,000,000	Investing Highlights Webpage (https://www.omers.com/investing-highlights)
Impact	Infrastructure Solutions AUM* (CDN\$)	\$3,300,000,000	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf)
Impact Denominator	Infrastructure AUM* (CDN\$)	\$21,000,000,000	Investing Highlights Webpage (https://www.omers.com/investing-highlights) Page 54
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)		

Impact	Carbon Footprint Metric Definition	tCO ₂ e/\$M - In line with the TCFD recommendations for Asset Owners and the GHG Protocol. Includes scope 1 & 2 emissions and uses the 'ownership approach,' which sets our proportionate ownership of an asset's carbon footprint equal to OMERS proportionate share of the asset's enterprise value	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf) Page 53
Impact	% of Assets Covered By Carbon Footprint Metric*	73%	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf) Page 54
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	58	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf) Page 54
Impact	% of E&S Shareholder Resolutions Supported*	Not Disclosed	
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	Yes	2020 Annual Report (https://downloads.ctfassets.net/iifcbkds7nke/3FG6BkPiiAMGFHgRy-hwZaq/945410f849c1e4b450f3e3d53314036e/2020_Annual_Report_FINAL-ua.pdf) Page 121
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$11,025,170,604	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	38%	Administration Corporation Webpage (https://www.omers.com/leadership#AdministrationCorporation) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	6%	Administration Corporation Webpage (https://www.omers.com/leadership#AdministrationCorporation) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	33%	Board of Directors Webpage (https://www.omers.com/board-of-directors) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	20%	Board of Directors Webpage (https://www.omers.com/board-of-directors) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	13%	Board of Directors Webpage and LinkedIn Profiles - Michael Fenn & Yung Wu
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	13.66	2019 Annual Report (https://assets.ctfassets.net/iifcbkds7nke/1DhAXVp76rE7mOwIF9Nu-WH/1aa15faaa4003e5ec476aa13f95d76fa/OMERS-2019-annual-report_FINAL-ua.pdf)

Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	Sustainable Investing Webpage (https://www.omers.com/sustainable-investing)
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	No	
Sustainable Governance	PRI Signatory (Yes/No)	No	
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication	

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

OPB

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	7.20%	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Not Defined	
Impact	Total AUM in Solutions (CDN\$)*		
Impact Denominator	Total AUM (CDN\$)*	\$31,000,000,000	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$13,361,000,000	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$2,542,000,000	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$8,401,000,000	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$4,092,000,000	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$2,573,000,000	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)		
Impact	Carbon Footprint Metric Definition	Not Defined	

Impact	% of Assets Covered By Carbon Footprint Metric*	Not Disclosed	
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	Not Disclosed	
Impact	% of E&S Shareholder Resolutions Supported*	Not Disclosed	
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	No	
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$36,542,350	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	43%	Leadership Team Webpage (https://www.opb.ca/about-opb/governance/leadership-team) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	14%	Leadership Team Webpage (https://www.opb.ca/about-opb/governance/leadership-team) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	63%	Board of Directors Webpage (https://www.opb.ca/about-opb/governance/board-of-directors) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	0%	Board of Directors Webpage (https://www.opb.ca/about-opb/governance/board-of-directors) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	13%	Board of Directors Webpage and LinkedIn Profiles - Suzann Pennington
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	6.04	2020 Annual Report (https://reports.opb.ca/2020/assets/pdf/OPB-2020-Annual-Report.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	No	
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	No	
Sustainable Governance	PRI Signatory (Yes/No)	Yes	Sustainability Webpage (https://reports.opb.ca/2020/sustainability.html)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	

Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

OPTRUST

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	7.10%	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Not defined	
Impact	Total AUM in Solutions (CDN\$)*		
Impact Denominator	Total AUM (CDN\$)*	\$26,500,000,000	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$1,908,000,000	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$3,178,000,000	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$10,827,000,000	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$3,189,000,000	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$2,620,000,000	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)		
Impact	Carbon Footprint Metric Definition	Not defined	
Impact	% of Assets Covered By Carbon Footprint Metric*	Not disclosed	
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	Not disclosed	

Impact	% of E&S Shareholder Resolutions Supported*	Engaged 543 companies on key ESG issues but did not specify % supported.	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf) Page 34
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	No	
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$493,683,180	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	25%	Executive Team Webpage (https://www.optrust.com/aboutoptrust/executive-team.asp) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	13%	Executive Team Webpage (https://www.optrust.com/aboutoptrust/executive-team.asp) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	40%	Board of Trustees Webpage (https://www.optrust.com/aboutoptrust/Board-of-Trustees.asp) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	10%	Board of Trustees Webpage (https://www.optrust.com/aboutoptrust/Board-of-Trustees.asp) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	20%	Board of Trustees Webpage and LinkedIn Profiles - Lindsey Burzese & Bob Plamondon
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	3.82	2020 Funded Status Report (https://optrust.com/FundedStatusReport/2020/OPTrust-2020-FSR.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	2020 Responsible Investing Report (https://www.optrust.com/investments/responsibleinvesting/2020Report/2020-OPTrust-Responsible-Investing-Report.pdf)
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	Yes	Climate Change Action Plan (https://www.optrust.com/documents/OPTrust-Climate-Change-Action-Plan.pdf)
Sustainable Governance	PRI Signatory (Yes/No)	Yes	2020 Responsible Investing Report (https://www.optrust.com/investments/responsibleinvesting/2020Report/2020-OPTrust-Responsible-Investing-Report.pdf)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	

Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication
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*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

OTPP

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	7.00%	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	The Eligibility Criteria identify Eligible Green Assets aligned to the Ontario Teachers' Green Investment Principles and the ICMA Green Bond Principles	https://www.otpp.com/news/article/a/ontario-teachers-releases-ambitious-interim-net-zero-targets
Impact	Total AUM in Solutions (CDN\$)*	\$30,000,000,000	https://www.otpp.com/news/article/a/ontario-teachers-releases-ambitious-interim-net-zero-targets
Impact Denominator	Total AUM (CDN\$)*	\$221,200,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$42,400,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$41,800,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$34,600,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Credit Solutions AUM* (CDN\$)		
Impact Denominator	Credit AUM* (CDN\$)	\$18,000,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$25,200,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$17,800,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Natural Resources Solutions AUM* (CDN\$)		
Impact Denominator	Natural Resources AUM* (CDN\$)		
Impact	Other Asset Class Solutions AUM* (CDN\$)		

Impact Denominator	Other Asset Class AUM* (CDN\$)	\$30,000,000,000	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)
Impact	Carbon Footprint Metric Definition	tCO2e/M\$	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980)
Impact	% of Assets Covered By Carbon Footprint Metric*	60% of our net assets as of December 31, 2019	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980)
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	79	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980)
	Public Equity Carbon Footprint	203	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980)
	Private Equity Carbon Footprint	41	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980)
Impact	% of E&S Shareholder Resolutions Supported*	Fund voted on 419 shareholder proposals related to ESG matters but does not specify % supported. Resource on all proxy votes here: https://viewpoint.glasslewis.com/WD/?sitelid=OTPP	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980)
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	Yes	2019 Climate Change Report (https://www.otpp.com/documents/10179/1021270/2019+Climate+Change+Report/f3eae93f-7531-440e-92ea-91275ec52980) Page 5
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$14,383,807,297	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	43%	Executives Webpage (https://www.otpp.com/corporate/executives) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	14%	Executives Webpage (https://www.otpp.com/corporate/executives) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	55%	Board Members Webpage (https://www.otpp.com/corporate/board-members) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	0%	Board Members Webpage (https://www.otpp.com/corporate/board-members) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	18%	Board Members Webpage & LinkedIn Profiles - Monika Federau & Gene Lewis
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	12.87	2020 Annual Report (https://www.otpp.com/documents/10179/1223191/2020+Annual+Report/ca2d6839-0ede-4848-9719-4ba6c65ba954)

Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	2019 Responsible Investing Report (https://www.otpp.com/documents/10179/1021270/2019+Responsible+Investing+Report/1a8f5dfc-8e06-41d2-8ec1-29b1c6ec5ae5)
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	Yes	2019 Responsible Investing Report (https://www.otpp.com/documents/10179/1021270/2019+Responsible+Investing+Report/1a8f5dfc-8e06-41d2-8ec1-29b1c6ec5ae5)
Sustainable Governance	PRI Signatory (Yes/No)	Yes	2019 Responsible Investing Report (https://www.otpp.com/documents/10179/1021270/2019+Responsible+Investing+Report/1a8f5dfc-8e06-41d2-8ec1-29b1c6ec5ae5)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	Yes--Net Zero Emissions by 2050. As a leading pension plan, we have the scale and influence to help support global efforts to limit global warming to 1.5° Celsius. This is why we are committed to achieve net-zero greenhouse gas emissions by 2050. With a long commitment to ESG, becoming net zero is a natural next step for us and aligns with our mission to deliver secure pensions, and purpose to shape a better future. Green investing, direct emissions elimination and avoidance, and reducing portfolio emissions are key aspects of this commitment	Climate Change Webpage (https://www.otpp.com/investments/responsible-investing/climate-change)
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	Climate Change Webpage (https://www.otpp.com/investments/responsible-investing/climate-change)
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication	Climate Change Webpage (https://www.otpp.com/investments/responsible-investing/climate-change)

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining “Sustainable Solutions” ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for “Sustainable Solutions” include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

PSP

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	9.30%	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Green assets includes investments in sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Total AUM in Solutions (CDN\$)*	\$12,600,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact Denominator	Total AUM (CDN\$)*	\$204,500,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$60,201,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$31,748,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$37,263,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$26,817,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$18,389,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Natural Resources Solutions AUM* (CDN\$)		
Impact Denominator	Natural Resources AUM* (CDN\$)	\$9,712,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Credit Solutions AUM* (CDN\$)		
Impact Denominator	Credit AUM* (CDN\$)	\$14,474,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Complementary Portfolio Solutions AUM* (CDN\$)		

Impact Denominator	Complementary Portfolio AUM* (CDN\$)	\$185,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)	\$5,702,000,000	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Carbon Footprint Metric Definition	tCO2e/M\$ - Total carbon emissions for PSP portfolio normalized by the market value of PSP portfolio (tons CO2e/\$ million invested). Weighted Average Carbon Intensity: PSP portfolio exposure to carbon-intensive companies (tons CO2e/\$ million revenue)	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	% of Assets Covered By Carbon Footprint Metric*	76% as at March 31, 2021: coverage includes public equity, private equity, infrastructure, real estate and natural resources	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	92****	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf) Page 101/116
Impact	% of E&S Shareholder Resolutions Supported*	Denominator not disclosed and numerator not clear. For public markets, we supported more than 150 ESG assessments, with proxy voting and engagement activities related to listed companies continuing to be an important area of focus too	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	No	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$ 21,705,000,000	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	33%	Senior Management Webpage (https://www.investpsp.com/en/psp/senior-management/) - Sept 1, 2021
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	0%	Senior Management Webpage (https://www.investpsp.com/en/psp/senior-management/) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	50%	Board Webpage (https://www.investpsp.com/en/psp/board/) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	10%	Board Webpage (https://www.investpsp.com/en/psp/board/) - Sept 1, 2021

Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	0%	Board Webpage & LinkedIn Profiles
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	10.28	2021 Annual Report (https://www.investpsp.com/media/filer_public/documents/PSP-2021-annual-report-en.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	Yes	https://www.fsb-tcf.org/supporters/
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	No indication	https://www.climateaction100.org/whos-involved/investors/
Sustainable Governance	PRI Signatory (Yes/No)	Yes	https://www.unpri.org/signatory-directory/public-sector-pension-investment-board/1676.article
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No firm public targets. " Looking forward, we will seek to establish a more robust evidence and data set to guide our investment decision-making and position our total portfolio favourably in a low-carbon environment."	https://www.investpsp.com/media/filer_public/documents/PSP-2021-responsible-investment-report-en.pdf
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	https://www.investpsp.com/media/filer_public/documents/PSP-2021-responsible-investment-report-en.pdf
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	Yes*****	https://www.investpsp.com/media/filer_public/documents/PSP-2021-responsible-investment-report-en.pdf

*Most Recent Fiscal Year End

**Current pension fund practice in Canada for defining "Sustainable Solutions" ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for "Sustainable Solutions" include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

***Holdings which are disclosed at the entity level, including value of investment

****Converted to tonnes at a rate of 1 ton = 0.907185 tonnes

****Not a formal published policy, but the fund indicated alignment in their responses based on industry association

VESTCOR

Category	Description	Value	Narrative/Source (reference link and page number)
Financial	5-year annualized rate of return (net nominal %)*	Not disclosed	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Sustainable Solutions Definition** Used By Pension Fund (if any)	Not defined	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Total AUM in Solutions (CDN\$)*		
Impact Denominator	Total AUM (CDN\$)*	\$19,441,900,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Public Equity Solutions AUM* (CDN\$)		
Impact Denominator	Public Equity AUM* (CDN\$)	\$6,805,000,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Private Equity Solutions AUM* (CDN\$)		
Impact Denominator	Private Equity AUM* (CDN\$)	\$924,000,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Fixed Income Solutions AUM* (CDN\$)		
Impact Denominator	Fixed Income AUM* (CDN\$)	\$9,130,000,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Real Estate Solutions AUM* (CDN\$)		
Impact Denominator	Real Estate AUM* (CDN\$)	\$1,233,000,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Infrastructure Solutions AUM* (CDN\$)		
Impact Denominator	Infrastructure AUM* (CDN\$)	\$1,161,000,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Other Asset Class Solutions AUM* (CDN\$)		
Impact Denominator	Other Asset Class AUM* (CDN\$)	\$1,517,000,000	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Carbon Footprint Metric Definition	Not defined	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	% of Assets Covered By Carbon Footprint Metric*	Not disclosed	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	Fund Carbon Footprint* (add new lines and break out by asset class if possible)	Not disclosed	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Impact	% of E&S Shareholder Resolutions Supported*	Not disclosed	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)

Sustainable Governance	Sustainability Pay Link - mechanism to link the remuneration of any member of a fund's top tier executive team with the achievement of environmental or social sustainability performance targets (Yes/No)	No	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Sustainable Governance	Value of Disclosed Holdings*** (CDN\$)	\$ 7,001,000,000	Capital IQ (Public disclosures and security filings including 13F Filings dated 2021-03-31)
Sustainable Governance	Executive Management Gender Diversity (% non-male)	50%	Interview with John Sinclair
Sustainable Governance	Executive Management Racial Diversity (% visible minority or indigenous)	0%	Corporate Overview Webpage (https://vestcor.org/en/about-us/corporate-overview/) - Sept 1, 2021
Sustainable Governance	Board Gender Diversity (% non-male)	40%	Governance Webpage (https://vestcor.org/en/about-us/governance/) - Sept 1, 2021
Sustainable Governance	Board Racial Diversity (% visible minority or indigenous)	0%	Governance Webpage (https://vestcor.org/en/about-us/governance/) - Sept 1, 2021
Sustainable Governance	Board ESG Competency (% with ESG experience - includes experience in impact function and/or impact organizations)	10%	Governance Webpage & LinkedIn Profiles
Sustainable Governance	CEO/Average Employee Pay* (Ratio)	7.14	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Sustainable Governance	Supports Taskforce on Climate-related Financial Disclosures (TCFD) (Yes/No)	No	TCFD Webpage (https://www.fsb-tcf.org/supporters/)
Sustainable Governance	Investor Signatory to Climate Action 100+ (Yes/No)	No	Climate Action 100+ Webpage (https://www.climateaction100.org/whos-involved/investors/)
Sustainable Governance	PRI Signatory (Yes/No)	No	UN PRI Webpage (https://www.unpri.org/signatories/signatory-resources/signatory-directory)
Sustainable Governance	Asset Allocation Targets for Net-Zero GHG emissions and/or Sustainable Solutions [specify targets and dates]	No indication	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Sustainable Governance	Policy to ensure that fund lobbying activities and industry association memberships are aligned with a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (Yes/No)	No indication	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)
Sustainable Governance	Require investees to ensure that any climate-related policy advocacy undertaken supports a just transition and the ambition of achieving global net-zero emissions by 2050 or sooner (including industry associations) (Yes/No)	No indication	2020 Annual report (https://vestcor.org/wp-content/uploads/2021/06/Annual-Report-2020-web-1.pdf)

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**Current pension fund practice in Canada for defining "Sustainable Solutions" ranges from referencing an external taxonomy to specific themes such as sustainable infrastructure, renewable energy, green buildings and certified sustainable forestry. Examples of external taxonomies for "Sustainable Solutions" include Climate Bonds Initiative (CBI) Taxonomy and EU Taxonomy (both focused specifically on sustainable environmental solutions), as well as the CK Taxonomy which integrates the CBI and EU taxonomy alongside sustainable social solutions (such as affordable medicine).

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ENDNOTE CITATIONS

- 1 EU Technical Expert Group on Sustainable Finance (2019). *Financing a Sustainable European Economy*. https://ec.europa.eu/info/sites/default/files/business_economy_euro/banking_and_finance/documents/190618-sustainable-finance-teg-report-climate-benchmarks-and-disclosures_en.pdf
- 2 In alignment with the UN-convened Net-Zero Asset Owner Alliance. <https://www.unepfi.org/net-zero-alliance/>
- 3 In alignment with the UN Principles for Responsible Investing (2021). “ESG-Linked Pay: Recommendations for Investors.” <https://www.unpri.org/executive-pay/esg-linked-pay-recommendations-for-investors/7864.article>
- 4 Based on the Wagemark approach. See: <https://www.masslb.com/wagemark>
- 5 Inclusive ratio reflecting gender (50% of population) and visible minority/Indigenous (27% of population) demographics of Canada. Statistics Canada (2016). Census Profile. <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=PR&Code1=01&Geo2=PR&Code2=01&Data=Count&SearchText=Canada&SearchType=Begin&SearchPR=01&B1=Visible%20minority&TABID=1>
- 6 In cases where the fund withholds support for E&S resolution supported by at least two major proxy advisory services, then ineligible for green.
- 7 Based on the approach of the 30% Club. See: <https://30percentclub.org/about/chapters/canada>
- 8 Based on the exposure to Corporate Knights green flag companies in the funds’ disclosed public equities portfolio. Green flag companies are companies that derive at least 20% of revenues from low-carbon solutions that align with the Corporate Knights Clean Economy Taxonomy. For further information, refer to: <https://www.corporateknights.com/wp-content/uploads/2021/09/Corporate-Knights-Clean-Taxonomy-210914.xlsx>



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- Andrea Moffat, Vice President, Ivey Foundation
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