

## Addenda Capital introduces the Eco-Social Commercial Mortgages Fund, inspired by the United Nations Sustainable Development Goals

Addenda Capital, a privately-owned investment management firm, is proud to announce the launch of the Addenda Eco-Social Commercial Mortgages Pooled Fund, which seeks to support the advancement of the United Nations Sustainable Development Goals (UN SDGs) while generating compelling financial returns.

One of the first of its kind in Canada, the Eco-Social Fund is the latest realization of Addenda's sustainable investing approach. The fund invests in first-rank commercial mortgages in Canada that endeavor to be consistent with social and environmental goals set by Addenda's Sustainable Investing team. In addition to helping meet the needs of institutional investors and high net worth clients, the Fund aims to support SDGs adopted by the 193 United Nations member states as a blueprint for sustainable development by 2030.

"The environmental and social challenges of the present and the future are immense. Aligning our clients' assets with United Nations SDGs can advance sustainable development solutions, while also seeking to provide compelling financial returns," said Roger Beauchemin, President and CEO of Addenda Capital. "Since our teams go beyond financial analysis during the investment process, the capital entrusted by our investors aims to meet their financial needs as well as create positive benefits for society."

Adopted in 2015, the [United Nations SDGs](#) include reducing inequalities, providing access to basic infrastructure, using clean energy, managing natural resources, promoting health and gender equality, and providing quality education.

Addenda manages approximately \$5 billion in commercial mortgages for its institutional and private wealth clients. Our team is composed of 14 professionals with deep market knowledge. The new Eco-Social Fund, whose quality mortgages are secured by real property in Canada, seeks to invest in the five main themes listed below. The themes are broken down into specific areas of focus (examples in brackets):

- Affordable housing (co-operative housing)
- Green buildings (energy efficiency upgrades)
- Underrepresented groups (visible minorities, women, people with disabilities, LGBTQ2S+ community members, Indigenous People)
- Cultural, non-profit and community facilities (heritage buildings, arts facilities and museums)
- Health and education (hospitals and educational institutions)

Addenda Capital has unveiled several sustainable investment solutions to meet the needs of investors while helping shape a better world. The firm's Climate Transition Funds support Canadian and international companies that are taking necessary steps to reduce their greenhouse gas (GHG) emissions to achieve a net zero society by 2050. In 2018, it launched the Addenda Impact Fixed Income Pooled Fund, one of the first of its kind in Canada, which seeks to generate positive and measurable social and environmental impacts while providing compelling returns. The company has also created a Fossil Fuel Free Fund, which excludes issuers that derive more than 10% of their revenues from fossil fuel activities.

## About Addenda Capital

With more than \$33 billion in assets under management, Addenda Capital is recognized as a leader in sustainable investing. From climate transition to impact investing to traditional strategies, our multi-asset solutions seek to provide enhanced returns for a clientele that is both institutional and private. At one point, we significantly enriched our investment process by integrating analysis of environmental, social and governance (ESG) issues. Today, we are playing an active role in the shift toward a net-zero economy while staying true to our commitment: serving our clients and generating sustainable wealth for a better future. Visit us at [addendacapital.com](https://addendacapital.com), join us on LinkedIn or follow us on [Twitter](#).

Headquartered in Montréal (Québec), Canada, Addenda also has offices in Toronto, Guelph and Regina. Co-owned by The Co-operators Group and employees, the firm is a signatory of the Net Zero Asset Managers initiative, the United Nations' Principles for Responsible Investment (UN PRI) and the Montréal Carbon Pledge, and an Investor Member of the Green Bond Principles.

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