

WOMEN IN INVESTING PANEL



IFIC

THE INVESTMENT
FUNDS INSTITUTE
OF CANADA

L'INSTITUT DES FONDS
D'INVESTISSEMENT
DU CANADA

Some Statistics

50.4%

Women currently make up more than half of Canada's total population

50%

Women are expected to control 50% of the financial wealth in Canada by 2026

\$710B

Women will inherit approximately \$710 billion in assets through wealth transfer in the next decade

90%

Most women will at some point in their lives be the sole financial decision maker

80%

If their partner leaves/dies, or if life circumstances change, 80% of women will change their adviser

Attributes of Women Investors

- Women are **goals-based** investors
- **Risk-aware** rather than risk-averse
- Focus on **achieving financial security**, and not solely on the financial outcomes
- Women investors are nearly **twice as likely** as men to consider both rate of return and positive environmental, social and governance impact when making an investment decision

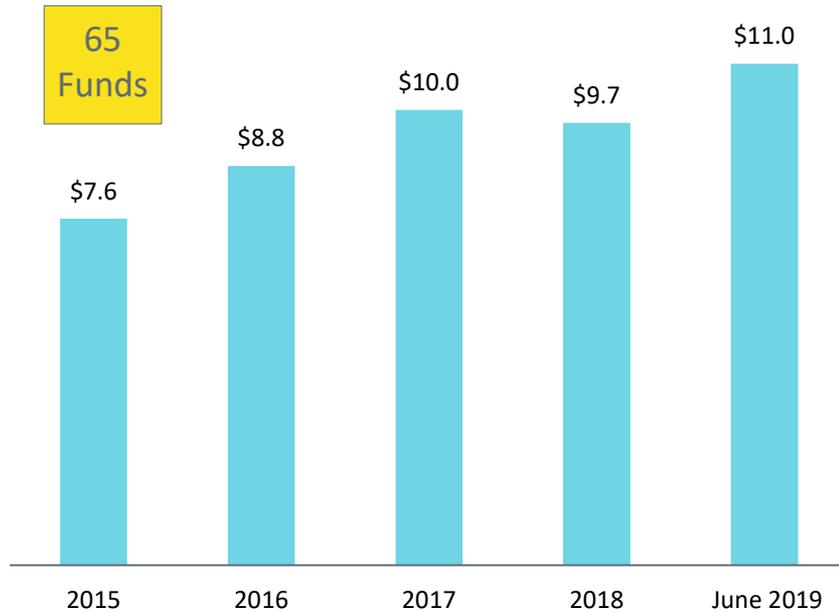
Women-Focused Products

A few examples...

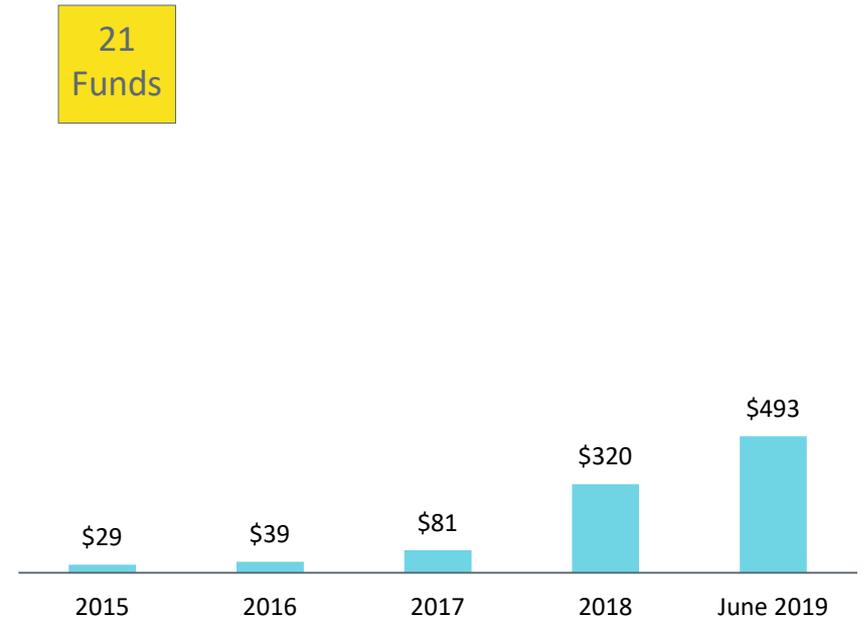
- BMO Women in Leadership Fund Series A (WOMN)
- Evolve North American Gender Diversity Index ETF (HERS CN)
- Mackenzie Global Leadership Impact ETF (MWMN)
- RBC Vision Women's Leadership MSCI Canada Index ETF (RLDR)
- Fidelity Women's Leadership Fund

Growth of Responsible Investment (RI) Funds

RI Mutual Fund Assets (\$ billions)



RI ETF Assets (\$ millions)



Women in Financial Services