

# Sun Life KBI Sustainable Infrastructure Private Pool

Be the change. Invest better.

Risk profile: LOW MEDIUM HIGH



Population growth, industrialization, and urbanization have led to global scarcities in clean water and food. Climate change poses serious environmental threats. All of these factors play a role in the immense growth of sustainable infrastructure.



In response, you can be the change the world needs by investing better. Bring purpose to your portfolio with sustainable infrastructure investing.

## Introducing Sun Life KBI Sustainable Infrastructure Private Pool.

### Benefits:



#### Superior growth opportunities:

Designed to capture growing opportunities in listed sustainable infrastructure. Globally focused on water and food infrastructure and technological advances in clean, efficient, and renewable sources of energy.



#### Stable income + inflation protection:

Exposure to income-generating sustainable infrastructure assets that also offer a hedge against inflation.



#### Sustainability:

Sustainability drivers are built directly into the investment objective and environmental, social, and governance (ESG) factors are integrated with the stock selection.



#### World-class expertise + innovation:

KBI Global Investors, a specialist investment management boutique, has managed sustainability-focused strategies for more than three decades.

### The Fund's opportunity in sustainable markets

- Clean energy utilities
- Diversified infrastructure
- Electrical grid
- Regulated water utility
- Digital infrastructure
- Yield companies
- Engineering and consulting
- Social infrastructure
- Water and waste treatment
- Renewable capex
- Agri storage and transportation
- Emerging markets water utility
- Waste to energy
- Farmland

#### Asset Class

Global Infrastructure Equity

#### Investment risk

Medium

#### Benchmark

S&P Global Infrastructure Index

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## KBI's 3-step approach to creating sustainable investment funds

01

Research and identify eligible companies providing infrastructure solutions to global sustainability challenges. Carry out fundamental stock analysis on potential companies with a focus on earnings stability, predictable cash flow generation, and regulatory support.

02


Hand pick high performance portfolios of 30-60 securities using a proprietary valuation tool that fully incorporates ESG analysis. This ensures ESG is a key contributor in determining investee companies in terms of their position sizing and relative attractiveness.

03

Ensure repeatable, executable, and credible business strategies. A specialist team shares insights and, through an active engagement program, challenges the stock portfolios for improvements as needed.

## 75.6% of Sun Life KBI Sustainable Infrastructure Private Pool's revenue directly supports the United Nations' sustainable development goals.

With Sun Life KBI Sustainable Infrastructure Private Pool, you gain access to growth opportunities, income generating assets, plus a hedge against inflation. You also can bring purpose to your portfolio by being the change the world needs.

 For more information, speak to your advisor or: Visit [sunlifeglobalinvestments.com/privateinvestmentpools](https://sunlifeglobalinvestments.com/privateinvestmentpools)  
Call **1-877-344-1434**

Any amount that is allocated to a segregated fund is invested at the risk of the contract owner and may increase or decrease in value.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Investors should read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns including changes in security value and reinvestment of all distributions and do not take into account sales, redemption, distribution or other optional charges or income taxes payable by any security holder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently, and past performance may not be repeated. Series F is available only to eligible investors who have fee-based accounts with their dealers.

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