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Data tables

The following data tables apply to IGM Financial and its operating companies.

Governance

| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 |
|--|------------------------|--------------|-------|-------|-------|-------|
| BOARD COMPOSITION¹ (GRI 2-9, 405-1) | | | | | | |
| Board Directors | Number | 15 | 15 | 15 | 15 | 15 |
| Executive Board members | Number | 1 | 1 | 1 | 1 | 1 |
| Non-executive Board members | Number | 14 | 14 | 14 | 14 | 14 |
| Women Directors | Number | 5 | 5 | 5 | 5 | 5 |
| Board gender diversity | Percent of total Board | 33 | 33 | 33 | 33 | 33 |
| Board age diversity | | | | | | |
| Over 70 | Number | 3 | 2 | 2 | 2 | 2 |
| Between 50 and 70 | Number | 11 | 13 | 13 | 13 | 13 |
| Between 30 and 49 | Number | 1 | 0 | 0 | 0 | 0 |
| Board tenure | Average years | 14 | 13 | 12 | 11 | 11 |
| Independent Board members² | Number | 9 | 9 | 9 | 9 | 9 |
| Board independence | Percentage | 60 | 60 | 60 | 60 | 60 |
| Audit Committee independence | Percentage | 100 | 100 | 100 | 100 | 100 |
| Related Party and Conduct Review Committee independence | Percentage | 100 | 100 | 100 | 100 | 100 |
| Human Resources Committee independence | Percentage | 57 | 57 | 57 | 57 | 50 |
| Risk Committee independence | Percentage | 57 | 57 | 57 | 57 | – |
| Governance and Nominating Committee independence | Percentage | 50 | 50 | 50 | 50 | 50 |
| Average Board and Committee meeting attendance rate | Percentage | 98 | 98 | 96 | 98 | 98 |
| Directors with four or less mandates³ | Percentage | 100 | 100 | 100 | 100 | 100 |
| AUDITOR'S FEES⁴ | | | | | | |
| Audit fees | \$ thousands | 2,531 | 3,684 | 2,574 | 2,773 | 2,427 |
| Audit-related fees | \$ thousands | 83 | 202 | 49 | 192 | 110 |
| Tax fees | \$ thousands | 48 | 62 | 64 | 114 | 163 |
| All other fees | \$ thousands | 321 | 310 | 1,426 | 310 | 236 |
| Fees paid for services other than the audit | Percentage | 12 | 9 | 36 | 13 | 14 |

1 All Board composition data is as of the dates of the annual meetings in the respective years, except for the Average Board and Committee Meeting Attendance Rates which are as of December 31.

2 The Board of the Corporation is composed of 15 Directors. Within the meaning of the CSA Guidelines and National Instrument 52-110 – Audit Committees and National Instrument 58-101 – Disclosure of Corporate Governance Practices (the “Instruments”) and in the Board’s view, the following nine Directors (constituting a 60% majority of the Board), namely Marc A. Bibeau, Marcel R. Coutu, Gary Doer, Susan Doniz, Sharon Hodgson, Sharon MacLeod, Susan J. McArthur, John McCallum and Beth Wilson are independent and have no other relationships that could reasonably interfere with the exercise of their independent judgement in discharging their duties to the Corporation. Paul Desmarais, Jr., André Desmarais, Claude Genereux, Jake Lawrence and R. Jeffrey Orr, being executive officers of Power Financial Corporation, are not independent within the meaning of the Instruments, but, in the Board’s view, they are all independent of management.

3 Represents mandates on public company boards outside Power Corporation and its subsidiaries (including Power Financial, Great-West Lifeco and IGM Financial).

4 For further details, see [IGM Annual Information Form](#).



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Ethics and compliance

| Topic | Measurement | 2024 | 2023 | 2022 | 2021 |
|--|----------------------------------|---|---|--|--|
| POLITICAL CONTRIBUTIONS (GRI 415-1) | | | | | |
| Amount of political contributions | \$ | 0 | 0 | 0 | 0 |
| PRODUCT AND SERVICE LABELING (GRI 417-2) | | | | | |
| Incidents of non-compliance with regulations and voluntary codes concerning product and service information and labeling in core documents, by type of outcomes. Core documents are those required under securities legislation in connection with distributions and continuous disclosure and include: Prospectuses, MRFPs, Fund Financial Statements, AIFs, Fund Facts. ¹ | Total number | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2024. | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2023. | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2022. | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2021. |
| MARKETING COMMUNICATIONS (GRI 417-3) | | | | | |
| Incidents of non-compliance with regulations and voluntary codes concerning marketing communications, including advertising, promotion and sponsorship by type of outcomes ^{2,3} | Total number | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2024. | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2023. | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2022. | IGM Financial and its operating companies did not have any significant incidents of non-compliance in 2021. |
| CUSTOMER PRIVACY (GRI 418-1) | | | | | |
| Substantiated complaints regarding breaches of customer privacy and losses of customer data | Total number | IGM Financial and its operating companies did not have any complaints substantiated by the Office of the Privacy Commissioner of Canada or provincial privacy commissioners in 2024.⁴ | IGM Financial and its operating companies did not have any complaints substantiated by the Office of the Privacy Commissioner of Canada or provincial privacy commissioners in 2023. ⁴ | IGM Financial and its operating companies did not have any complaints substantiated by the Office of the Privacy Commissioner of Canada or provincial privacy commissioners in 2022. | IGM Financial and its operating companies did not have any complaints substantiated by the Office of the Privacy Commissioner of Canada or provincial privacy commissioners in 2021. |
| LAWS AND REGULATIONS (GRI 2-27) | | | | | |
| Total number of significant instances of non-compliance with laws and regulations resulting in fines or non-monetary sanctions, and the total number and value of monetary fines ⁵ | Total number, total dollar value | Refer to Legal Proceedings and Regulatory Actions section of 2024 Annual Information Form. | Refer to Legal Proceedings and Regulatory Actions section of 2023 Annual Information Form . | Refer to Legal Proceedings and Regulatory Actions section of 2022 Annual Information Form . | Refer to Legal Proceedings and Regulatory Actions section of 2021 Annual Information Form . |

1 Non-compliance instances are defined as material misstatements in core documents that would require IGM Financial or its operating companies to amend documents, re-file with the regulators and remedy with clients.

2 Marketing communications are defined as corporate marketing materials and advertising, including sponsorships that are covered by the Mutual Fund Sales Practices Rule. Communications prepared by advisors with the operating companies are included.

3 Non-compliance instances are defined as material misstatements that would require IGM Financial or its operating companies to amend documents and remedy with clients.

4 In late March 2023, one of the operating companies was notified by one of its third-party vendors, InvestorCOM Inc., that they were compromised due to a cybersecurity incident related to a technology supplier to InvestorCOM, GoAnywhere. The operating company has notified impacted clients and offered credit monitoring at no cost for two years to clients, which has been extended for an additional three years. Refer to Note 27, Contingent liabilities, in the [2024 IGM Financial Inc. Annual Report](#).

5 Significant instances of non-compliance with laws and regulations are defined as instances for which fines or non-monetary sanctions were incurred and are reported in the Legal Proceedings and Regulatory Actions section of IGM Financial's Annual Information Form. Non-monetary sanctions are defined as significant suspensions or cancellations of registrations or material conditions or restrictions on registration pertaining to IGM Financial and its operating companies, and IG advisors, imposed as a result of a hearing or formal settlement agreement with regulators or self-regulatory organizations.



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Taxes

| Topic | Measurement | 2024 | 2023 ¹ | 2022 | 2021 | 2020 |
|--|-------------|-------|-------------------|-------|-------|-------|
| TAXES (GRI 201-1) | | | | | | |
| Income taxes by jurisdiction | | | | | | |
| Federal Government ² | \$ million | 172.5 | 142.4 | 162.6 | 174.6 | 123.7 |
| British Columbia | \$ million | 3.3 | 1.7 | 2.6 | 1.4 | 1.0 |
| Alberta ² | \$ million | 2.4 | 1.2 | 1.7 | 1.1 | 0.9 |
| Saskatchewan ² | \$ million | 1.1 | 0.5 | 0.7 | 0.5 | 0.3 |
| Manitoba ² | \$ million | 19.6 | 14.5 | 19.6 | 37.0 | 13.9 |
| Ontario ² | \$ million | 39.9 | 32.9 | 38.6 | 37.4 | 22.3 |
| Quebec ² | \$ million | 8.8 | 5.7 | 7.3 | 4.0 | 2.9 |
| New Brunswick | \$ million | 0.5 | 0.2 | 0.3 | 0.2 | 0.1 |
| Nova Scotia | \$ million | 0.6 | 0.3 | 0.4 | 0.1 | 0.1 |
| PEI | \$ million | 0.2 | 0.1 | 0.1 | 0.1 | 0.1 |
| Newfoundland | \$ million | 0.4 | 0.1 | 0.2 | 0.1 | 0.1 |
| Total Canadian income taxes | \$ million | 249.3 | 199.6 | 234.1 | 256.5 | 165.4 |
| China | \$ million | 7.3 | 6.9 | 3.1 | 2.7 | 1.4 |
| Ireland | \$ million | 1.5 | 1.2 | 1.0 | 1.5 | 1.0 |
| Hong Kong | \$ million | 0.7 | 0.6 | 0.7 | 1.0 | 0.8 |
| United States | \$ million | 6.0 | 1.2 | 0.5 | 0.1 | (0.2) |
| Total international income taxes | \$ million | 15.5 | 9.9 | 5.3 | 5.3 | 3.0 |
| Total current income taxes | \$ million | 264.8 | 209.5 | 239.4 | 261.8 | 168.4 |
| Total deferred income taxes | \$ million | 10.8 | 5.8 | 15.3 | 56.8 | 32.3 |
| Total income taxes | \$ million | 275.6 | 215.3 | 254.7 | 318.6 | 200.7 |
| Total other taxes – capital, commodity, payroll, property, business and other ² | \$ million | 26.0 | 29.4 | 28.4 | 34.0 | 29.8 |

1 In 2023, amounts include taxes from discontinued operations and other items.
2 Starting in 2021, amounts include taxes that have been reclassified and recorded through retained earnings.



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| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 |
|---|-------------------|---------|-------------------|-------------------|-------------------|-------------------|
| MACKENZIE INVESTMENTS | | | | | | |
| Number of companies engaged on ESG issues | | | | | | |
| Mackenzie-led engagements ¹ | Number | 209 | 205 | 369 | 467 | 621 |
| Service provider engagements | Number | n/a | n/a | 974 | 969 | 973 |
| Climate-related engagements ² | Number | 181 | 147 | 635 | 743 | n/a |
| Proxy votes cast during year by Mackenzie ³ | Percentage | 100 | 100 | 100 | 100 | 100 |
| Sub-advisors who are PRI signatories | Percentage of AUM | 100 | 100 | 100 | 100 | 100 |
| IG WEALTH MANAGEMENT | | | | | | |
| Proxy votes cast during year by investment sub-advisors ³ | Percentage | 99 | 99 | 98 | 99 | 100 |
| Sub-advisors who are PRI signatories | Percentage of AUM | 100 | 100 | 100 | 100 | 100 |
| PRODUCTS DELIVERING SPECIFIC SOCIAL OR ENVIRONMENTAL BENEFITS – IGM FINANCIAL (GRI FS7, FS11) | | | | | | |
| Best-in-class, thematic and impact investment funds – AUM ⁴ | \$ million | 5,800.0 | 6,020.0 | 4,814.0 | 4,320.0 | 1,648.0 |
| Charitable Giving Funds – IG Wealth Management and Mackenzie Investments | \$ million | 484.6 | 402.9 | 347.1 | 373.0 | 298.2 |
| Registered Disability Savings Plans | \$ million | 2,951.2 | 2,343.9 | 1,783.1 | 1,792.6 | 1,384.2 |
| Percentage of total AUM subject to negative environmental or social screens ⁵ | Percentage | 93.8 | 93.4 ⁶ | 93.7 ⁶ | 94.2 ⁶ | 95.8 ⁶ |

1 Restated 2020 to report companies engaged versus all engagements, including multiple engagements with a single company.

2 For 2023 and 2024, represents all climate-related engagements conducted across Mackenzie. For 2021–2022, climate-related engagements included “Mackenzie-led engagements” and “Service provider engagements.”

3 Per PRI reporting and Proxy Voting Policy requirements found [here](#).

4 Every investment boutique at Mackenzie utilizes ESG factors in their investment process. The \$5.8B in AUM quoted above includes only “sustainable investment” products where sustainability goals are explicitly outlined in the objectives and strategies of each product by prospectus.

5 Introduced exclusionary Policy on Cluster Munitions and Anti-Personnel Landmines in 2018 which applies to equity and corporate credit holdings, but not to investments in derivatives or other index exposures where our exposure is indirect and outside of our control.

6 We have restated previously reported figures to maintain alignment with historical reporting and ensure data continuity.



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Talent

| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 |
|--|--------------|-------|-------|-------|-------|-------|
| EMPLOYEES BY REGION (GRI 2-7) | | | | | | |
| British Columbia | Total number | 121 | 119 | 113 | 99 | 95 |
| Alberta | Total number | 133 | 110 | 129 | 99 | 90 |
| Saskatchewan | Total number | 20 | 21 | 19 | 19 | 15 |
| Manitoba | Total number | 1,230 | 1,285 | 1,284 | 1,331 | 1,327 |
| Ontario | Total number | 1,551 | 1,637 | 1,981 | 1,924 | 1,750 |
| Quebec | Total number | 465 | 462 | 466 | 425 | 414 |
| Atlantic Canada | Total number | 51 | n/a | n/a | 44 | 36 |
| New Brunswick | Total number | 21 | 18 | 19 | n/a | n/a |
| Nova Scotia | Total number | 14 | 14 | 22 | n/a | n/a |
| Newfoundland and Labrador | Total number | 8 | 9 | 9 | n/a | n/a |
| Prince Edward Island | Total number | 8 | 6 | 4 | n/a | n/a |
| Yukon | Total number | 0 | n/a | n/a | n/a | n/a |
| Northwest Territories | Total number | 0 | n/a | n/a | n/a | n/a |
| Nunavut | Total number | 0 | n/a | n/a | n/a | n/a |
| Canada total | Total number | 3,571 | 3,681 | 4,046 | 3,941 | 3,727 |
| China | Total number | 3 | 3 | 3 | 1 | 2 |
| Ireland | Total number | 12 | 13 | 14 | 11 | 12 |
| U.K. | Total number | 1 | 0 | 0 | 0 | 0 |
| Hong Kong | Total number | 13 | 13 | 11 | 12 | 13 |
| U.S. | Total number | 14 | 13 | 13 | 14 | 13 |
| Total employees worldwide ^{1,2} | Total number | 3,614 | 3,723 | 4,087 | 3,979 | 3,767 |

1 The total number of employees and advisors are based on head count as at December 31st.
2 During the period, no significant fluctuations in the number of workers who are employees and non-employees.



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| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 |
|---|--------------|-------|-------|-------|-------|-------|
| IG WEALTH MANAGEMENT ADVISORS BY REGION (GRI 2-8) | | | | | | |
| Alberta | Total number | 405 | 415 | 437 | 447 | 435 |
| Atlantic Canada | Total number | n/a | n/a | n/a | 219 | 218 |
| New Brunswick | Total number | 70 | 67 | 75 | n/a | n/a |
| Nova Scotia | Total number | 52 | 52 | 68 | n/a | n/a |
| Newfoundland and Labrador | Total number | 44 | 47 | 47 | n/a | n/a |
| Prince Edward Island | Total number | 35 | 35 | 28 | n/a | n/a |
| Yukon | Total number | n/a | n/a | n/a | n/a | n/a |
| Northwest Territories | Total number | n/a | n/a | n/a | n/a | n/a |
| Nunavut | Total number | n/a | n/a | n/a | n/a | n/a |
| British Columbia | Total number | 318 | 319 | 350 | 368 | 381 |
| Manitoba | Total number | 185 | 191 | 198 | 202 | 194 |
| Ontario | Total number | 1,136 | 1,113 | 1,171 | 1,167 | 1,198 |
| Quebec | Total number | 774 | 730 | 744 | 735 | 734 |
| Saskatchewan | Total number | 117 | 118 | 125 | 140 | 144 |
| Total advisors ^{1,2} | Total number | 3,136 | 3,087 | 3,243 | 3,278 | 3,304 |
| IG WEALTH MANAGEMENT ASSISTANTS BY REGION (GRI 2-7) | | | | | | |
| Alberta | Total number | 179 | 185 | 185 | 191 | 179 |
| Atlantic Canada | Total number | n/a | n/a | n/a | 108 | 91 |
| New Brunswick | Total number | 26 | 27 | 30 | n/a | n/a |
| Nova Scotia | Total number | 21 | 22 | 32 | n/a | n/a |
| Newfoundland and Labrador | Total number | 24 | 21 | 24 | n/a | n/a |
| Prince Edward Island | Total number | 18 | 20 | 16 | n/a | n/a |
| Yukon | Total number | n/a | n/a | n/a | n/a | n/a |
| Northwest Territories | Total number | n/a | n/a | n/a | n/a | n/a |
| Nunavut | Total number | n/a | n/a | n/a | n/a | n/a |
| British Columbia | Total number | 162 | 174 | 191 | 191 | 193 |
| Manitoba | Total number | 84 | 83 | 79 | 81 | 69 |
| Ontario | Total number | 468 | 481 | 504 | 501 | 467 |
| Quebec | Total number | 345 | 335 | 339 | 338 | 270 |
| Saskatchewan | Total number | 36 | 42 | 46 | 54 | 48 |
| Total assistants ^{1,2} | Total number | 1,363 | 1,390 | 1,446 | 1,464 | 1,317 |

1 The total number of employees and advisors are based on head count as at December 31st.
2 During the period, no significant fluctuations in the number of workers who are employees and non-employees.



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|---|----------------------------|-------|-------|-------|-------|-------|
| EMPLOYEES BY GENDER AND TYPE (GRI 2-7) | | | | | | |
| Total worldwide ^{1,2} | Total number | 3,614 | 3,723 | 4,087 | 3,979 | 3,767 |
| Women | Total number | 1,993 | 2,109 | 2,327 | 2,279 | 2,128 |
| Men | Total number | 1,608 | 1,602 | 1,745 | 1,694 | 1,637 |
| Non-binary/Gender not listed ³ | Total number | 13 | 12 | 15 | 6 | 2 |
| Permanent | Total number | 3,533 | 3,651 | 4,010 | 3,827 | 3,525 |
| Women | Total number | 1,952 | 2,066 | 2,275 | 2,177 | 1,993 |
| Men | Total number | 1,576 | 1,573 | 1,720 | 1,644 | 1,530 |
| Non-binary/Gender not listed ³ | Total number | 5 | 12 | 15 | 6 | 2 |
| Temporary | Total number | 46 | 64 | 65 | 152 | 242 |
| Women | Total number | 30 | 37 | 41 | 102 | 135 |
| Men | Total number | 16 | 27 | 24 | 50 | 107 |
| Non-binary/Gender not listed ³ | Total number | 0 | 0 | n/a | n/a | n/a |
| Casual | Total number | 27 | 8 | 12 | n/a | n/a |
| Women | Total number | 11 | 6 | 11 | n/a | n/a |
| Men | Total number | 16 | 2 | 1 | n/a | n/a |
| Non-binary/Gender not listed ³ | Total number | 0 | 0 | n/a | n/a | n/a |
| Full-time employees | Total number | 3,541 | 3,606 | 4,017 | 3,921 | 3,696 |
| Women | Total number | 1,949 | 2,025 | 2,288 | 2,230 | 2,063 |
| Men | Total number | 1,587 | 1,569 | 1,016 | 1,685 | 1,631 |
| Non-binary/Gender not listed ³ | Total number | 5 | 12 | 10 | 6 | 2 |
| Part-time employees (includes casual) | Total number | 65 | 45 | 70 | 58 | 71 |
| Women | Total number | 44 | 41 | 62 | 49 | 65 |
| Men | Total number | 21 | 4 | 7 | 9 | 6 |
| Non-binary/Gender not listed ³ | Total number | 0 | 0 | 1 | n/a | n/a |
| COLLECTIVE BARGAINING AGREEMENTS (GRI 2-30) | | | | | | |
| Employees covered by collective bargaining agreements | Percent of total employees | 0 | 0 | 0 | 0 | 0 |

1 The total number of employees and advisors are based on head count as at December 31st.
2 During the period, no significant fluctuations in the number of workers who are employees and non-employees.
3 In 2024, the ratio is calculated using worldwide number of employees. From 2019–2021 the ratio was calculated using permanent employees only.



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|---|-------------------------------------|------|------|------|------|------|
| NEW EMPLOYEE HIRES (GRI 401-1) | | | | | | |
| Total new hires worldwide ¹ | Total number | 755 | 844 | 941 | n/a | n/a |
| Percent total new hires worldwide | Percent of total employees | 20.9 | 22.7 | 23.0 | n/a | n/a |
| Total new hires permanent ¹ | Total number | 544 | n/a | n/a | 592 | 317 |
| Percent total new hires permanent | Percent of total employees | 15.1 | n/a | n/a | 15.5 | 9.0 |
| Employee age groups | | | | | | |
| Under 30 | Percent of total employees | 48.9 | 43.2 | 45.2 | 29.6 | 31.2 |
| Age 30–50 | Percent of total employees | 42.5 | 46.1 | 40.6 | 54.2 | 58.0 |
| Over 50 | Percent of total employees | 8.6 | 10.7 | 14.2 | 16.2 | 10.7 |
| Employee gender | | | | | | |
| Women | Percent of total employees | 48.6 | 51.2 | 52.4 | 55.4 | 46.1 |
| Men | Percent of total employees | 50.7 | 48.2 | 47.0 | 44.1 | 53.9 |
| Non-binary/Gender not listed ² | Percent of total employees | 0.7 | 0.6 | 0.6 | 0.5 | n/a |
| EMPLOYEE TURNOVER (GRI 401-1) | | | | | | |
| Total turnover – permanent employees | Total number | 699 | 582 | 638 | 491 | 275 |
| Percent total turnover | Percent of total employees | 19.3 | 15.9 | 15.9 | 12.8 | 7.8 |
| Voluntary turnover – permanent employees | Total number | 330 | 311 | 583 | 400 | 191 |
| Percent voluntary turnover | Percent of total employees | 9.3 | 8.5 | 14.5 | 10.5 | 5.4 |
| Employee age groups | | | | | | |
| Under 30 | Percent of total employees | 23.0 | 18.0 | 34.6 | 25.7 | 24.4 |
| Age 30–50 | Percent of total employees | 49.1 | 54.0 | 46.2 | 54.2 | 53.8 |
| Over 50 | Percent of total employees | 27.9 | 28.0 | 19.2 | 20.2 | 21.8 |
| Employee gender | | | | | | |
| Women | Percent of total employees | 58.0 | 51.7 | 52.6 | 51.9 | 54.9 |
| Men | Percent of total employees | 41.6 | 47.8 | 46.9 | 47.7 | 45.1 |
| Non-binary/Gender not listed ² | Percent of total employees | 0.4 | 0.5 | 0.5 | 0.3 | n/a |
| TRAINING AND EDUCATION (GRI 404-3) | | | | | | |
| Employees receiving performance reviews | Percent of total eligible employees | 100 | 100 | 100 | 100 | 100 |

1 In Q3 2022, RVPs were recategorized from Regional Directors to full-time employees.
2 In 2024, the ratio is calculated using worldwide number of employees. From 2019–2021 the ratio was calculated using permanent employees only.



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| DIVERSITY, EQUITY AND INCLUSION (GRI 405-1) | | | | | | |
| Employee gender | | | | | | |
| Women | Percent of total employees | 55.1 | 56.7 | 56.9 | 57.3 | 56.5 |
| Men | Percent of total employees | 44.5 | 43.0 | 42.7 | 42.5 | 43.4 |
| Non-binary/Gender not listed ¹ | Percent of total employees | 0.4 | 0.3 | 0.4 | 0.2 | 0.1 |
| Employees by ethnic/racial identity ^{2,3} | | | | | | |
| White | Percent of self-identified employees | 42.4 | 40.6 | 40.3 | 37.6 | n/a |
| Racialized (Pan-Asian, Latin American) | Percent of self-identified employees | 28.5 | 31.1 | 24.5 | 21.9 | n/a |
| Black | Percent of self-identified employees | 7.4 | 7.1 | 5.8 | 5.0 | n/a |
| Indigenous | Percent of self-identified employees | 1.3 | 1.4 | 1.3 | 1.3 | n/a |
| Not yet self-disclosed/prefer not to disclose | Percent of self-identified employees | 20.3 | 19.8 | 28.1 | 34.1 | n/a |
| Employees who identify as 2SLGBTQIA+ ^{2,3} | Percent of self-identified employees | 3.4 | 3.4 | 2.8 | 1.5 | n/a |
| Employees with a disability ^{2,3} | Percent of self-identified employees | 2.8 | 2.3 | 1.8 | 1.3 | n/a |
| Employee age groups | | | | | | |
| Under 30 | Percent of total employees | 16.3 | 16.7 | 15.4 | 15.0 | 13.5 |
| Age 30–50 | Percent of total employees | 56.8 | 56.7 | 56.8 | 58.8 | 61.0 |
| Over 50 | Percent of total employees | 26.9 | 26.6 | 27.8 | 26.2 | 25.5 |
| Employee executive (senior) ^{2,3} | | | | | | |
| Women | Percent of total employees | 28.0 | 33.8 | 32.5 | 31.8 | 33.3 |
| Men | Percent of total employees | 71.6 | 65.7 | 67.1 | 67.8 | 66.7 |
| Non-binary/Gender not listed | Percent of total employees | 0.4 | 0.5 | 0.4 | 0.4 | n/a |
| White ⁴ | Percent of self-identified employees | 72.8 | 69.7 | 67.9 | n/a | n/a |
| Racialized (Pan-Asian, Latin American) ⁴ | Percent of self-identified employees | 14.1 | 16.2 | 15.4 | n/a | n/a |
| Black ⁴ | Percent of self-identified employees | 2.9 | 3.5 | 2.8 | n/a | n/a |
| Indigenous | Percent of self-identified employees | 1.6 | 1.5 | 0.8 | n/a | n/a |
| Not yet self-disclosed/prefer not to disclose ⁴ | Percent of self-identified employees | 8.6 | 9.1 | 13.0 | n/a | n/a |
| Employees who identify as 2SLGBTQIA+ ⁴ | Percent of self-identified employees | 1.6 | 2.0 | 2.0 | n/a | n/a |
| Employees with a disability ⁴ | Percent of self-identified employees | 1.2 | 1.5 | 2.0 | n/a | n/a |
| Under 30 | Percent of total employees | 0.0 | n/a | n/a | n/a | n/a |
| Age 30–50 | Percent of total employees | 41.2 | 46.0 | 49.3 | 51.1 | 54.0 |
| Over 50 | Percent of total employees | 58.8 | 54.0 | 50.7 | 48.9 | 46.0 |

1 In 2024, the ratio is calculated using worldwide number of employees. From 2019–2021 the ratio was calculated using permanent employees only.
2 In Q3 2022, RVPs were recategorized from Regional Directors to full-time employees.
3 Includes Vice-President and above.
4 In 2022, executive management excluded operating companies CEOs. A re-statement resulted in some increased and decreased values.



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Talent (continued)

| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 |
|---|--------------------------------------|------|------|------|------|------|
| DIVERSITY, EQUITY AND INCLUSION (GRI 405-1) (CONTINUED) | | | | | | |
| Employee management (middle) ^{1,2} | | | | | | |
| Women | Percent of total employees | 47.3 | 46.7 | 47.6 | 46.4 | 47.4 |
| Men | Percent of total employees | 52.4 | 53.1 | 52.2 | 53.5 | 52.6 |
| Non-binary/Gender not listed | Percent of total employees | 0.4 | 0.2 | 0.2 | 0.1 | n/a |
| White | Percent of self-identified employees | 49.3 | 49.6 | 49.7 | n/a | n/a |
| Racialized (Pan-Asian, Latin American) | Percent of self-identified employees | 29.0 | 25.4 | 20.0 | n/a | n/a |
| Black | Percent of self-identified employees | 4.6 | 4.5 | 3.8 | n/a | n/a |
| Indigenous | Percent of self-identified employees | 1.1 | 1.2 | 1.1 | n/a | n/a |
| Not yet self-disclosed/prefer not to disclose | Percent of self-identified employees | 16.0 | 19.3 | 25.4 | n/a | n/a |
| Employees who identify as 2SLGBTQIA+ | Percent of self-identified employees | 3.0 | 2.9 | 2.2 | n/a | n/a |
| Employees with a disability | Percent of self-identified employees | 2.5 | 2.1 | 1.4 | n/a | n/a |
| Under 30 | Percent of total employees | 8.2 | 8.3 | 7.9 | 7.8 | 7.0 |
| Age 30–50 | Percent of total employees | 64.3 | 66.0 | 63.4 | 64.6 | 67.8 |
| Over 50 | Percent of total employees | 27.5 | 25.7 | 28.7 | 27.7 | 25.3 |
| Employee non-management (junior) ³ | | | | | | |
| Women | Percent of total employees | 66.6 | 68.0 | 67.9 | 67.3 | 65.6 |
| Men | Percent of total employees | 33.0 | 31.6 | 31.6 | 32.5 | 34.3 |
| Non-binary/Gender not listed | Percent of total employees | 0.4 | 0.4 | 0.5 | 0.2 | 0.1 |
| White | Percent of self-identified employees | 31.5 | 29.1 | 28.9 | n/a | n/a |
| Racialized (Pan-Asian, Latin American) | Percent of self-identified employees | 40.1 | 37.8 | 29.5 | n/a | n/a |
| Black | Percent of self-identified employees | 10.7 | 9.7 | 7.7 | n/a | n/a |
| Indigenous | Percent of self-identified employees | 1.5 | 1.6 | 1.4 | n/a | n/a |
| Not yet self-disclosed/prefer not to disclose | Percent of self-identified employees | 16.2 | 21.7 | 32.5 | n/a | n/a |
| Employees who identify as 2SLGBTQIA+ | Percent of self-identified employees | 4.0 | 4.0 | 3.3 | n/a | n/a |
| Employees with a disability | Percent of self-identified employees | 3.3 | 2.5 | 2.0 | n/a | n/a |
| Under 30 | Percent of total employees | 26.4 | 25.6 | 23.1 | 19.5 | 19.6 |
| Age 30–50 | Percent of total employees | 51.8 | 50.6 | 53.0 | 56.9 | 57.0 |
| Over 50 | Percent of total employees | 21.8 | 23.8 | 23.9 | 23.6 | 23.5 |

1 In Q3 2022, RVPs were recategorized from Regional Directors to full-time employees.
2 Excludes executive management.
3 In 2024, the ratio is calculated using worldwide number of employees. From 2019–2021 the ratio was calculated using permanent employees only.



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| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 |
|--|-------------------------------|------|-------|------|------|------|
| DIVERSITY, EQUITY AND INCLUSION (GRI 405-1) (CONTINUED) | | | | | | |
| IG Wealth Management – Regional Vice-Presidents ¹ | | | | | | |
| Women | Percent of RVPs | 11.5 | 13.0 | 10.0 | n/a | n/a |
| Men | Percent of RVPs | 88.5 | 87.0 | 90.0 | n/a | n/a |
| IG Wealth Management Advisors ² | | | | | | |
| Women | Percent of total advisors | 29.0 | 29.0 | 29.0 | 28.0 | 27.0 |
| Men | Percent of total advisors | 71.0 | 71.0 | 71.0 | 72.0 | 73.0 |
| IG Wealth Management Advisors – new recruits | | | | | | |
| Women | Percent of total new advisors | 40.0 | 40.0 | 40.0 | 35.0 | 26.0 |
| Men | Percent of total new advisors | 60.0 | 60.0 | 60.0 | 65.0 | 74.0 |
| PARENTAL LEAVE (GRI 401-3) | | | | | | |
| Employees entitled to parental leave | | | | | | |
| Women | Total number | – | 2,470 | | | |
| Men | Total number | – | 1,939 | | | |
| Non-binary/Gender not listed ³ | Total number | – | – | | | |
| Employees took parental leave | | | | | | |
| Women | Total number | 67 | 31 | | | |
| Men | Total number | 32 | 30 | | | |
| Non-binary/Gender not listed ³ | Total number | 0 | | | | |

1 Includes Vice-President and above.
2 The total number of employees and advisors are based on head count as at December 31st.
3 In 2024, the ratio is calculated using worldwide number of employees. From 2019–2021 the ratio was calculated using permanent employees only.



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| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 | 2013 – base year |
|--|----------------------------|-----------|-----------|-----------|-----------|-----------|------------------|
| ENERGY CONSUMED WITHIN THE ORGANIZATION^{1,2,3} (GRI 302-1) | | | | | | | |
| Natural gas (heating) ⁴ | Megawatt hours | 2,953 | 3,119 | 3,239 | 2,469 | 3,421 | 5,872 |
| Back-up diesel fuel ⁵ | Megawatt hours | 12 | 9 | 16 | – | 14 | – |
| Direct energy consumed | Megawatt hours | 2,965 | 3,129 | 3,254 | 2,469 | 3,435 | 5,872 |
| Indirect energy (electricity) consumed | Megawatt hours | 5,008 | 5,012 | 4,406 | 3,676 | 4,298 | 6,648 |
| Indirect energy (distribution of water) consumed | Megawatt hours | 2 | 2 | 1 | 1 | 2 | 4 |
| Total energy consumed within the organization | Megawatt hours | 7,976 | 8,142 | 7,661 | 6,146 | 7,735 | 12,525 |
| % of electricity consumed within the organization from low-carbon sources ⁶ | Percent of total | 100 | 100 | 100 | 100 | 100 | 100 |
| % of energy consumed within the organization from low-carbon sources ⁶ | Percent of total | 100 | 100 | 100 | 100 | 100 | 53 |
| ENERGY CONSUMED OUTSIDE THE ORGANIZATION (GRI 302-2) | | | | | | | |
| Upstream leased properties | Megawatt hours | 30,722 | 32,436 | 34,284 | 31,947 | 35,222 | 43,563 |
| Investment fund properties ⁷ | Megawatt hours | 266,179 | 274,233 | 266,245 | 257,246 | 240,770 | 232,795 |
| Business travel – air ⁸ | Thousands of statute miles | 8,440 | 6,759 | 3,275 | 178 | 1,976 | 15,506 |
| Business travel – ground ⁸ | Thousands of kilometres | 1,452 | 1,438 | 993 | 278 | 624 | 2,458 |
| WATER AND WASTE CONSUMPTION (GRI 303-1, 306-2) | | | | | | | |
| Water consumed in operations | Thousands of cubic metres | 102 | 100 | 107 | 74 | 99 | 181 |
| Waste generated in operations – owned facility ⁹ | Tonnes | 48 | 46 | 47 | 46 | 41 | 100 |
| ENERGY INTENSITY (GRI 302-3) | | | | | | | |
| Total energy consumed in owned and leased office space ¹⁰ | Megawatt hours | 38,697 | 40,578 | 41,945 | 38,093 | 42,957 | 56,087 |
| Number of people in owned and leased premises ¹¹ | Number | 8,377 | 7,808 | 8,035 | 7,741 | 7,823 | 8,822 |
| Canadian office space ¹² | Average square feet | 1,555,736 | 1,628,460 | 1,665,220 | 1,749,541 | 1,838,275 | 1,877,291 |
| Energy consumed per person | Megawatt hours/person | 4.62 | 5.20 | 5.22 | 4.92 | 5.49 | 6.36 |
| Energy consumed per square foot | Megawatt hours/square foot | 0.025 | 0.025 | 0.025 | 0.022 | 0.023 | 0.030 |

1 Baseline year 2013 and all subsequent historical years (2014–2023) have been recalculated to reflect any updates in the historical emission factors from the latest published source document, ensuring consistency with our historical reporting methodology. We are in the process of reviewing our recalculation methodology.

2 GHG emissions were measured in accordance with the Greenhouse Gas Protocol: A Corporate Accounting and Reporting Standard (2004) (“GHG Protocol”), using the financial control consolidation approach covering IGM Financial.

3 Due to the sale of Investment Planning Counsel (IPC) in November 2023, metrics associated with IPC’s leased properties have been removed from all reporting periods.

4 Conversion to MWh from volume of natural gas consumed was based on the conversion tool available [here](#). Natural gas is used for heating.

5 Conversion to MWh from volume of back-up diesel fuel consumed was based on the conversion tool available [here](#).

6 Renewable energy includes Manitoba Hydro and Bullfrog Power green natural gas.

7 As of 2019, the IG Real Property Fund was included in this inventory. The energy-related data reported in 2024 is equal to an average square feet of 12,187,602. New developments were included from the date of initial operation, while for purchased properties, data was estimated back to the 2013 baseline, based on their earliest available data. This methodology is in line with GHG Protocol Guidance. In 2024, historical data for a number of properties became available for the first time, resulting in data revisions from 2013 to the present. As of 2024, facility 1090 Homer began purchasing 100% green natural gas directly from Fortis BC.

8 Includes only air travel booked through our travel booking system, which is the standard procurement process. Ground travel is from the use of personal vehicles only. These metrics do not include business travel by IG advisors referenced in footnote 11 below.

9 Waste generated from operations is from owned premises only. Waste is weighed by the third-party disposal contractor.

10Includes owned and leased properties for operations. Does not include properties from investments – see footnote 7 above.

11 Includes 3,589 employees based on full-time equivalents (FTEs) and 4,788 IG advisors based on headcount in 2024.

12 Square footage is amended as needed based on updates and recent measuring. Where no specific reason exists for a change in area (expansion, etc.), the change is made for all years from 2013–2024.



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| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 | 2013 – base year |
|---|------------------------------------|----------------|---------|---------|--------|--------|------------------|
| TOTAL GHG EMISSIONS^{1,2,3,4} (GRI 305-1, 305-2, 305-3) | | | | | | | |
| Direct GHG emissions prior to application of renewable thermal certificates (RTCs) ³ | Metric tonnes of CO ₂ e | 639 | 593 | 617 | 468 | 632 | 1,078 |
| Less: RTCs purchased ⁵ | Metric tonnes of CO ₂ e | (559) | (591) | (613) | (468) | (628) | – |
| Direct GHG emissions (Scope 1) | Metric tonnes of CO ₂ e | 80 | 2 | 4 | – | 4 | 1,078 |
| Less: Carbon offsets purchased for Scope 1 ⁶ | Metric tonnes of CO ₂ e | (80) | (2) | (4) | | | |
| Net after carbon offsets | Metric tonnes of CO ₂ e | – | – | – | – | 4 | 1,078 |
| Indirect GHG emissions (market-based) (Scope 2) | Metric tonnes of CO ₂ e | 7 | 7 | 2 | 4 | 2 | 22 |
| Less: Carbon offsets purchased for Scope 2 ⁶ | Metric tonnes of CO ₂ e | (7) | (7) | (2) | | | |
| Net after carbon offsets | Metric tonnes of CO ₂ e | – | – | – | 4 | 2 | 22 |
| Other indirect GHG emissions from operations (Scope 3) | | | | | | | |
| Gross emissions from upstream leased properties | Metric tonnes of CO ₂ e | 3,983 | 4,150 | 4,409 | 4,081 | 4,550 | 7,069 |
| Less: RTCs purchased ⁵ | Metric tonnes of CO ₂ e | – | (49) | (138) | (123) | (130) | – |
| Category 8: Upstream leased assets | Metric tonnes of CO ₂ e | 3,983 | 4,102 | 4,271 | 3,958 | 4,420 | 7,069 |
| Category 6: Business travel – air ⁷ | Metric tonnes of CO ₂ e | 1,145 | 938 | 468 | 58 | 480 | 3,385 |
| Category 6: Business travel – ground ⁷ | Metric tonnes of CO ₂ e | 269 | 267 | 184 | 52 | 116 | 456 |
| Category 5: Waste generated in operations | Metric tonnes of CO ₂ e | 103 | 98 | 100 | 98 | 88 | 214 |
| Total other indirect GHG emissions from operations (Scope 3) | Metric tonnes of CO ₂ e | 5,501 | 5,405 | 5,023 | 4,166 | 5,103 | 11,124 |
| Less: Carbon offsets purchased for Scope 3 ⁶ | Metric tonnes of CO ₂ e | (5,501) | (5,405) | (5,023) | | | |
| Net after carbon offsets | Metric tonnes of CO ₂ e | – | – | – | 4,166 | 5,103 | 11,124 |
| Total emissions from operations (Scope 1, 2 and 3) before offsets ⁸ | Metric tonnes of CO ₂ e | 5,588 | 5,414 | 5,030 | 4,170 | 5,109 | 12,225 |
| Total emissions from operations (Scope 1, 2 and 3) after offsets | Metric tonnes of CO ₂ e | – | – | – | 4,170 | 5,109 | 12,225 |
| Total other indirect GHG emissions from investment funds (Scope 3) | | | | | | | |
| Category 15: Investment fund properties ⁹ | Metric tonnes of CO ₂ e | 46,719 | 48,490 | 47,333 | 45,708 | 42,663 | 47,610 |

1 Baseline year 2013 and all subsequent historical years (2014-2023) have been recalculated to reflect any updates in the historical emission factors from the latest published source document, ensuring consistency with our historical reporting methodology. We are in the process of reviewing our recalculation methodology.

2 GHG emissions include emissions from the Canadian operations of IGM Financial and its operating companies and investments stated in footnote 9 below, using a base year of 2013 – our first public year of reporting. We applied global warming potentials from IPCC AR6 and Canadian emission factors from the National Inventory Report 1990–2023: Greenhouse Gas Sources and Sinks in Canada Part 1, Part 2 & Part 3 (Ottawa: Environment and Climate Change Canada, 2025).

3 Scope 1 includes emissions from natural gas, back-up fuels and refrigerants. According to the GHG Protocol, GHGs regulated by the *Montreal Protocol on Substances that Deplete the Ozone Layer* are to be reported outside of the scopes of a corporate inventory. As such, 77.34 tCO₂e in 2024 and 31.12 tCO₂e in 2020 from the refrigerant R-22 are not included.

4 Due to the sale of IPC in November 2023, metrics associated with IPC’s leased properties have been removed from all reporting periods.

5 Since 2015, IGM has purchased renewable thermal certificates (from Bullfrog Power) to match 100% of the natural gas consumed at our owned facility, as well as matching for the Canada Life Campus in Toronto from 2015 to 2021 (with excess purchases used in 2022 and 2023). Our purchase volume is based on consumption measured in cubic metres (m³). The emissions factor associated with the combustion of this renewable natural gas effectively addresses the CO₂e emissions that otherwise would have been present with conventional natural gas, thereby reducing our natural gas emissions.

6 IGM purchases offsets to cover the following emissions: (i) remaining Scope 1, 2 and 3 emissions in our owned facility after the application of Bullfrog Power renewable thermal certificates, (ii) Scope 3 emissions from leased properties, and (iii) Scope 3 emissions from business travel (ground transportation and corporate air travel). In 2024, 4,000 tCO₂e of Gold Standard-certified credits were purchased while in 2023, 7,900 tCO₂e of Gold Standard-certified carbon offsets were purchased. To offset 2024 emissions of 5,588 tCO₂e, 3,457 tCO₂e of carry over offsets from 2023 were applied and 2,131 tCO₂e from 2024 were applied. IGM revised its carbon offsets procurement process to reduce the amount of surplus carbon offsets carry over from previous years.

7 Includes only air travel booked through our travel booking system, which is the standard procurement process. Ground travel is from the use of personal vehicles only. These metrics do not include business travel by IG advisors referenced in footnote 11 on the previous page.

8 Total emissions from operations (Scope 1, 2 and 3) before offsets includes values where Bullfrog Power renewable thermal certificates were already net out from Scope 1 and Scope 3 respectively.

9 As of 2019, the IG Real Property Fund was included in this inventory. The energy-related data reported in 2024 is equal to an average square feet of 12,187,602. New developments were included from the date of initial operation, while for purchased properties, data was estimated back to the 2013 baseline, based on their earliest available data. This methodology is in line with GHG Protocol Guidance. In 2024, historical data for a number of properties became available for the first time, resulting in data revisions from 2013 to the present. As of 2024, facility 1090 Homer began purchasing 100% green natural gas directly from Fortis BC.



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| Topic | Measurement | 2024 | 2023 | 2022 | 2021 | 2020 | 2013 – base year |
|---|--|-----------|-----------|-----------|-----------|-----------|------------------|
| EMISSIONS INTENSITY (GRI 305-4) | | | | | | | |
| Total emissions from owned and leased office space ¹ | Metric tonnes of CO ₂ e | 5,588 | 5,414 | 5,030 | 4,170 | 5,109 | 12,225 |
| Number of people in owned and leased premises | Number | 8,377 | 7,808 | 8,035 | 7,741 | 7,823 | 8,822 |
| Canadian office space ² | Average square feet | 1,555,736 | 1,628,460 | 1,665,220 | 1,749,541 | 1,838,275 | 1,877,291 |
| Emissions per person | Metric tonnes of CO ₂ e/person | 0.67 | 0.69 | 0.63 | 0.54 | 0.65 | 1.39 |
| Emissions per square foot | Metric tonnes of CO ₂ e/square foot | 0.004 | 0.003 | 0.003 | 0.002 | 0.003 | 0.007 |

1 Includes owned and leased properties for operations. Does not include properties from investments – see footnote 9 on previous page.
2 Square footage is amended as needed based on updates and recent measuring. Where no specific reason exists for a change in area (expansion, etc.), the change is made for all years from 2013–2024.