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Asset Management & Custody Activities Sustainability Accounting Standard

SASB Topic	SASB Code	Accounting Metric	Category	Response
Transparent Information & Fair Advice for Customers	FN-AC-270a.2	Total amount of monetary losses as a result of legal proceedings associated with marketing and communication of financial product related information to new and returning customers	Quantitative	2024 Sustainability Report – Data tables – Ethics and compliance (Page 51)
	FN-AC-270a.3	Description of approach to informing customers about products and services	Discussion and Analysis	2024 Sustainability Report – Ethics and compliance (Pages 35–36); Information security and privacy – Privacy (Page 38)
Employee Diversity & Inclusion	FN-AC-330a.1	Percentage of gender and diversity group representation for (1) executive management, (2) non-executive management, (3) professionals, and (4) all other employees	Quantitative	2024 Sustainability Report – Data tables – Talent (Pages 58–60)
Incorporation of Environmental, Social, and Governance Factors in Investment Management & Advisory	FN-AC-410a.1	Amount of assets under management, by asset class, that employ (1) integration of environmental, social, and governance (ESG) issues, (2) sustainability themed investing, and (3) screening	Quantitative	IG Wealth Management PRI Transparency Report Mackenzie Investments PRI Transparency Report
	FN-AC-410a.2	Description of approach to incorporation of environmental, social, and governance (ESG) factors in investment and/or wealth management processes and strategies	Discussion and Analysis	IG Wealth Management Sustainable Investing Policy Mackenzie Investments Sustainable Investing Policy IG Wealth Management PRI Transparency Report Mackenzie Investments PRI Transparency Report
	FN-AC-410a.3	Description of proxy voting and investee engagement policies and procedures	Discussion and Analysis	Mackenzie Investments PRI Transparency Report
Financed Emissions	FN-AC-410b.1	Absolute gross financed emissions, disaggregated by (1) Scope 1, (2) Scope 2 and (3) Scope 3	Quantitative	2024 Sustainability Report – Action on Climate (Page 24)
	FN-AC-410b.2	Total amount of assets under management (AUM) included in the financed emissions disclosure	Quantitative	Not reported
	FN-AC-410b.3	Percentage of total assets under management (AUM) included in the financed emissions calculation	Quantitative	Not reported
	FN-AC-410b.4	Description of the methodology used to calculate financed emissions	Discussion and Analysis	Not reported
Business Ethics	FN-AC-510a.1	Total amount of monetary losses as a result of legal proceedings associated with fraud, insider trading, anti-trust, anti-competitive behaviour, market manipulation, malpractice, or other related financial industry laws or regulations	Quantitative	2024 Sustainability Report – Data tables – Ethics and compliance (Page 51)
	FN-AC-510a.2	Description of whistleblower policies and procedures	Discussion and Analysis	2024 Sustainability Report – Ethics and compliance (Pages 4, 35)
Activity Metrics	FN-AC-000.A	Total AUM	Quantitative	\$253.6B in AUM&A as of December 31, 2024.