

Introducing NBI *SmartBeta* Funds

Managed by Rothschild & Co Asset Management US Inc.

Bridging the gap between
active and passive investing

The challenge with passive “cap-weighted” indexing

- ❖ Biased towards past successes
 - Overweight in stocks that have risen
 - Underweight in stocks that have declined
- ❖ No risk management process
- ❖ Significant sector concentration
- ❖ Lack of systematic rebalancing strategy

NBI *SmartBeta* Funds

- ❖ Allow rule-based decisions and active returns
- ❖ Aim at optimizing the risk/return of a specific index
- ❖ Offer superior diversification
- ❖ Conduct systematic monthly rebalancing

At the intersection
of active and passive
investing, NBI
SmartBeta Funds
offer you a smarter
way to buy the index.

NBI *SmartBeta* Funds

Are managed by **Rothschild & Co
Asset Management US Inc.**,
a world-renowned portfolio
manager



Follow a **simple,
transparent and systematic**
investment process



Incorporate an innovative
risk management approach

The NBI *SmartBeta* Funds (the “Funds”) are offered by National Bank Investments Inc. (“NBI”), a wholly owned subsidiary of National Bank of Canada. Rothschild & Co Asset Management US Inc. (“Rothschild”) acts as portfolio sub-advisor for the Funds. Commissions, trailing commissions, management fees and expenses all may be associated with investments in the Funds. Please read the prospectus of the Funds before investing. The Funds’ securities are not insured by the Canada Deposit Insurance Corporation or by any other government deposit insurer. The Funds are not guaranteed, their values change frequently and past performance may not be repeated.

See next page for continuation of disclosure.



Open architecture.
Endless opportunities.

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Disclosure

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