



## RI Canada

*Building Momentum for a Just Transition in Canada*

Toronto, 18-19 October 2022

The 3rd RI Canada conference brings together leading banks, pension funds, insurers, and financial regulators to pave the way to a sustainable, net-zero economy.

The agenda will explore what strides are being taken by Canadian institutions on a range of emerging ESG innovations, investment opportunities and showcase best in class strategies.

The content will address such topics as climate and decarbonisation strategies, mitigating the transition risk for real assets, digesting disclosure and regulatory developments for reporting, the rise of social performance in ESG efforts and the application of the Just Transition concept to ensure the pivot to a more sustainable economy is inclusive, equitable and fair.

### **Previous Attendees Include**

BCI, CDPQ, CIBC Asset Management, CPPIB, Credit Suisse, Daiwa Capital Markets, Desjardins, DWS, European Investment Bank, First Sentier Investors, Future Fund, Government of Alberta, HSBC Bank Canada, Ivanhoe Cambridge, Manulife, Mercer, NEI Investments, OTPP, PSP, Scotia Bank

Confirmed speakers:

1. Rachel Horwat, Senior Manager, Sustainability, **Ivanhoé Cambridge**
2. Vincent Felteau, Senior Director, Responsible Investment, Private Markets, **PSP Investments (TBC)**
3. Lindsey Walton, Head of Canada, **UN PRI**
4. Anne-Marie Gagnon, Manager, ESG - Public Markets, **BCI**
5. Sarah Takaki, Head of Sustainable Investing, **Healthcare of Ontario Pension Plan**
6. **OMERS**, speaker TBC
7. **CDPQ**, speaker TBC
8. Susan Golyak, Senior Manager, ESG - Public Markets, **BCI**



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## Draft agenda

### Day one – Tuesday 18<sup>th</sup> October

08:00 Registration

08:50 Welcome remarks from Responsible Investor

Lucy Fitzgeorge-Parker, Editor, **Responsible Investor**

09:00 The initiatives that are moving the needle for sustainability in Canada

- Sustainable Finance Action Council: integrating sustainable finance into standard industry practices
- The Net-Zero Advisory Body: identifying pathways to help Canada achieve net-zero emissions by 2050
- Climate Engagement Canada: finance leaders driving Canada's transition to net zero
- Update on other initiatives

Kevin Thomas, Chief Executive Officer, **SHARE**

Andrew Brenner, Director of Investment Management Integration, **Value Reporting Foundation**

Sarah Takaki, Head of Sustainable Investing, **Healthcare of Ontario Pension Plan Addenda Capital**, speaker TBC

Moderated by Gina Gambetta, Reporter, **Responsible Investor**

09:45 Can ESG investing in its current guise change the world?

- Defining stakeholder capitalism for the 21<sup>st</sup> Century
- Can we trust corporations to act in our best long-term interests even when it reduces profits for shareholders?
- Are ESG professionals doing enough to drive fundamental change?
- How should Canada's banking institutions work with polluting companies?

Tariq Fancy, Founder & CEO, **The Rumie Initiative**

Bruce Simpson, Senior Advisor ESG to multiple companies

Bernstein Litowitz Berger & Grossmann LLP, speaker TBC

Moderated by Mona Naqvi, Global Head of Capital Markets Strategy, **S&P Global Sustainable1**



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10:30 Coffee & networking

11:10 **Keynote interview: The importance of aligning the Canadian financial sector with climate commitments**

Senator Rosa Galvez, Senator, **Quebec**

*In conversation with* Gina Gambetta, Reporter, Responsible Investor

11:30 **Engagement, divestment and beyond: How should Canada's investors & financial institutions engage with its natural resource companies?**

- What is investor sentiment in engaging with extractive companies?
- What is the landscape of investment opportunities in climate tech and sustainable energy?
- How are investors deploying capital in climate solution?
- Is divestment about exiting oil and gas or reducing carbon risk?
- How are investors working with corporates on ESG plans?

Olaf Weber, Professor & University Research Chair, **University of Waterloo**

Samantha McDonald, Vice President, TD Asset Management Inc, **TD Asset Management**

Truzaar Dordi, Post-Doctoral Fellow & Vice President, **University of Victoria & Canadian Society for Ecological Economics**

Rosa van den Beemt, Vice President of Stewardship, Responsible Investment, **BMO Asset Management**

Moderated by Karen Restoule, CEO, **Shared Value Solutions**

12:15 **Progress to ESG disclosure standardisation**

- How have disclosure initiatives such as the International Sustainability Standards Board (ISSB) and the Taskforce on Nature-related Financial Disclosures (TNFD) progressed?
- What will we ever reach a precise 'financial reporting' standard on sustainability?
- How far along is progress to harmonising ESG measurement methodologies?
- What frameworks are leading companies using to demonstrate their ESG risk and performance?
- How will ESG data methodology develop in the next 5 years as the practice matures & where is innovation still required?

Samantha Hill, Managing Director, **Sustainable Investing, CPPIB**  
 Hyewon Kong, Vice President, Head of Responsible Investing, **Investment Management Corporation of Ontario (IMCO)**  
 Katharine Preston, Vice President, **Sustainable Investing, OMERS**  
 Pamela Steer, President & CEO, **CPA Canada**  
 Katherine Short, Associate Director, Sustainable Investing, **OMERS**

13:00 Lunch

Stream A Tackling Climate Change	Stream B Investment Opportunities
<p><b>14:30 – Overview of leading climate and decarbonisation strategies</b></p> <ul style="list-style-type: none"> <li>• What policies are leading institutions implementing as part of their decarbonisation plans?</li> <li>• What are the most common challenges and headaches faced in implementing a net zero strategy?</li> <li>• How is progress towards net zero being incentivised?</li> <li>• How are companies with a net zero commitment going about operationalising this aspiration?</li> <li>• What role should carbon offsets have as part of a net zero investment strategy?</li> </ul> <p><i>Moderator:</i> Katherine Tweedie, Managing Director, <b>Ninety One Canada</b></p> <p>Shweta Arya, Sustainable Investing and Innovation, <b>OPTrust</b>            Richard Brooks, Climate Finance Director, <b>Stand Earth</b>            Karen Lockridge, Director, ESG Investing, <b>Canada Post Corporation Pension Plan</b>            Tom Campos, Head of Sustainable Investment, Americas, <b>FTSE Russell</b></p>	<p><b>14:30 - Addressing human rights in the portfolio</b></p> <ul style="list-style-type: none"> <li>• How are investors mapping their exposure to human rights abuses?</li> <li>• How are investors engaging with corporates on human rights?</li> <li>• What policies and practices are leading corporate implementing to protect human rights within their sphere of influence?</li> <li>• How can financial institutions get a handle on their exposure to child and forced labor, and modern-day slavery?</li> </ul> <p>Moderator: Ayman Chowdhury, Head of Secretariat, <b>Global Compact Network Canada</b></p> <p>Sarah Couturier-Tanoh, Manager Corporate Engagement and Shareholder Advocacy (ESG), <b>SHARE</b></p> <p>Meagan Barrera, North America Researcher &amp; Representative, <b>Business and Human Rights Resource Centre</b></p>



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	<p>Michela Gregory, Director, Environmental, Social and Governance (ESG) Services, <b>NEI Investments</b></p>
<p>15:10 Short break</p>	
<p><b>15:20 - Quantifying and managing climate risk to real assets</b></p> <ul style="list-style-type: none"> <li>• How mature is climate risk management as a practice across the financial sector?</li> <li>• How is climate risk being integrated into investment decision-making?</li> <li>• How are different financial institutions measuring climate risk to their business, operations and assets?</li> <li>• What steps can be taken to mitigate negative climate-related impacts to asset valuations?</li> </ul> <p>Rachel Horwat, Senior Manager, Sustainability, <b>Ivanhoé Cambridge</b>  Tomas Dauden, Principal - Responsible Investing, <b>OTPP</b>  Vincent Felteau, Senior Director, Responsible Investment, Private Markets, <b>PSP Investments</b>  Senior representative, <b>Persefoni</b></p>	<p><b>15:20 - Investment and financing opportunities for climate tech</b></p> <ul style="list-style-type: none"> <li>• What are the best examples of climate transition investments in Canada?</li> <li>• Which technologies are game-changing in the clean economy transition?</li> <li>• To what extent will institutional investors need to take on VC-type risk to gain exposure to support emerging climate technologies?</li> <li>• How mature are hydrogen and carbon capture and storage businesses?</li> </ul> <p>David Isaac, President, <b>W Dusk Energy Group</b>  David Bennell, Principal, <b>VCA LLC</b></p>
<p>16:00 Short break</p>	
<p><b>16:15 - Climate transition scenario analysis</b></p>	



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- Update on the work of Bank of Canada and the Office of the Superintendent of Financial Institutions (OSFI)
- Capturing climate risks to the economy and financial system
- Considering other risks including physical risk and interaction between physical and transition risks

Moderator: Sarah Keyes, CEO, **ESG Global Advisors**

Julie Segal, Senior Program Manager, Climate Finance, **Environmental Defence**  
Henrik Jeppesen, Head of Investor Outreach, **Carbon Tracker**  
**Bloomberg**, speaker TBC

**16:15 - Natural capital investment opportunities**

- What types of investments can be natural capital assets in Canada?
- What is the return/risk profile of natural capital assets, and how scalable are these strategies?
- To what extent should carbon credits be a part of a net zero portfolio claim?
- To what extent should forestry and other organic carbon capture investments be a part of climate strategy?

Maggie Childe, Head of Sustainable Investing, **iA Financial Group**

Sofia Condés, Senior Investor Outreach Manager, **FAIRR Initiative**

17:00 Networking drinks

18:00 End of day one

## Day Two – Wednesday 19<sup>th</sup> October

08:00 Asset-owners breakfast

09:00 Interactive roundtable discussions

1. Practical steps to getting to net-zero - *Rachel Horwat, Senior Manager, Sustainability, Ivanhoé Cambridge*
2. How ESG practitioners can influence senior management - *Katherine Short, Associate Director, Sustainable Investing, OMERS*
3. Developing social performance within an ESG strategy - *Mark Podlasly, Director of Economic Policy and Initiatives, First Nation Major Projects Coalition*
4. Responsible investment in fixed income - *Anne-Marie Gagnon, Manager, ESG - Public Markets, BCI*



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5. Unpacking financial leverage and human rights in value chains - *Lauren Muusse, Investor Engagement Lead, World Benchmarking Alliance*
6. Topic TBC - *Lindsey Walton, Head of Americas, UN PRI*
7. Integrating biodiversity into financial decision making
8. Environmental Justice in RI: Inter-generational & International

Stream A	Stream B
<p><b>10:15 - Utilising ESG data to enhance investment strategy</b></p> <ul style="list-style-type: none"> <li>• Comparing ESG data for public and private companies</li> <li>• Why a comprehensive approach assesses data across the E, S &amp; G</li> <li>• Where are conventional ESG datasets missing the full picture?</li> <li>• How can investors make the most of new sources of information: geospatial data, artificial intelligence, big data?</li> <li>• How are investor requests changing on data?</li> <li>• To what extent is ESG data a source of alpha?</li> </ul> <p>Moderator: Lauren Muusse, Investor Engagement Lead, <b>World Benchmarking Alliance</b>            Sean Cleary, Executive Director, <b>Institute of Sustainable Finance</b>            Franca Wolf, Senior Analyst, <b>Verisk Maplecroft</b>            Catherine Isabelle, Senior Director, Responsible Investment, <b>PSP Investments</b></p>	<p><b>10:15 - How should pension plans engage with their members on ESG?</b></p> <ul style="list-style-type: none"> <li>• To what extent should beneficiaries have a voice on sustainable investments?</li> <li>• How and at what stage should beneficiaries be involved</li> <li>• What is holding back the democratization of sustainable investment strategy?</li> <li>• Comparing Canada to Europe and the rest of the world on this</li> <li>• To what extent is beneficiary activism a growing trend and a concern for pension plans?</li> </ul> <p>Adam Scott, Executive Director, <b>Shift: Action for Pension Wealth and Planet Health</b>            Bill Young, Founder, <b>Social Capital Partners</b></p>
<p>11:00 Short Break</p>	
<p><b>11:30 - Including Indigenous Peoples in a just transition</b></p>	<p><b>11:30 - The rise of sustainability-linked financing solutions</b></p>



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- What does a just transition mean for indigenous communities in Canada?
- Co-investment opportunities with indigenous communities
- What will be the consequences of the adoption of Bill C-15?

Mark Prystupa, Director Indigenous and Community Relations, **Suncor**  
 Joseph Bastien, Project Manager, Reconciliation and Responsible Investment Initiative, **SHARE**  
 Mark Podlasly, Director of Economic Policy and Initiatives, **First Nation Major Projects Coalition**

- Are Canadian banks creating credible ESG incentives to their borrowers?
- What are some of the more innovative models being applied in the market by Canadian institutions?
- To what extent are sustainability finance solutions able to move the needle on SDG achievement?
- What is the role of 'catalytic' subsidised capital in blended financing structures for nascent technologies?

Anne-Marie Gagnon, Manager, ESG - Public Markets, **BCI**  
 Matt Price, Director of Corporate Engagement, **Investors for Paris Compliance**  
 Amy Hepburn, CEO, **Investor Leadership Network (ILN)**

**12:15 - Social impact in Canadian real estate**

- How can social considerations be leveraged for value creation in real estate?
- What are the best examples of different housing impact investments such as affordable housing, supported housing and highly adapted housing?
- What are the revenue models supporting sustainable housing projects and how viable are they?
- What opportunities exist for collaboration with indigenous peoples in ownership and development of real estate projects?

**12.15 - Pushing sustainability in public companies: governance, lobbying and voting strategies**

- How are leading public equities investors going about driving sustainability in their portfolios?
- To what extent are we seeing credible incentives on ESG performance being tied to executive pay in?
- How are investors influencing public companies through their voting strategy?

Catherine Simard, Senior Director, Sustainable Investing, **CDPQ**  
 Catherine McCall, Executive Director, **Canadian Coalition for Good Governance**





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Garth Davis, Managing Partner, **New Market Funds**

Tsering Yangki, Head of Real Estate Finance and Development, **Dream Unlimited Corp., Dream Impact Trust & Dream Office REIT**

Heather Tremain, Chief Executive Officer, **Options For Homes**

Lisa Williams, Senior Vice-President, Strategy, **Canada Mortgage and Housing Corporation (CMHC)**

**(CCGG)**

Lesley Marks, Chief Investment Officer, Equities, **Mackenzie Investments**

Jennifer Stevenson, Vice President and Portfolio Manager, **Dynamic Funds**

13.00 Lunch

#### 14.00 Canadian investors' take on impact investment market

- Can you achieve impact through public markets?
- How are Canadian institutional investors viewing the proliferation of impact funds around the world?
- What is the appetite of Canadian investors to allocate to impact funds?
- What are the main concerns of institutional investors when assessing whether to invest into impact?
- What are the best examples of impact funds and how are they deploying capital in Canada?
- How are investors considering the potential conflict of interest with returns-first investment mandates?

Belissa Rojas, Impact Measurement & Management Lead, SDG Impact Team, **UNDP**

Jamie Cooper, Portfolio Manager, **Dream Impact Fund, Dream Unlimited Corp.**

Ellen Quigley, Senior Research Associate, Climate Risk & Sustainable Finance, **Centre for the Study of Existential Risk (CSER)**

Financial Officer, **University of Cambridge**

Jim Walker, Partner, **Align3 Capital Partners**

Moderated by Stephanie Emond, Chief Impact Officer, **FinDev Canada**

#### 14.45 Cutting through the froth: how well is Canada addressing diversity and inclusion within its institutions?



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- How much progress has been made by corporate Canada in all forms of diversity?
- To what extent are investors pressuring companies? Have they got their own house in order?
- Comparing Canada to other parts of the world

Susan Golyak, Senior Manager, ESG - Public Markets, **BCI**

Lindsey Walton, Head of Canada, **UN PRI**

Teresa Palandra, Senior Partner, Canada Wealth Business Leader, **Mercer Canada**

Solène Hanquier, ESG Strategies Leader, **Desjardins Global Asset Management**

**15.00 End of conference**