About Evovest

Evovest automates investment decisions with a scientific approach. Machine learning allows us to identify the best potential investments by analyzing financial and macroeconomic information. Our approach stands out by integrating the best practices in portfolio management and artificial intelligence. Our commitment is to generate superior returns through an innovative approach at a competitive cost.

Q2 2022 Quarterly Review

A busy quarter for Evovest on several aspects. Although the markets are tumultuous, you will be able to read in our commentary how we have been able to adapt to market conditions and create value for our clients.

UNPRI

Evovest is now officially a signatory to the United Nations Principles for Responsible Investment. By signing the principles, we, as investors, publicly commit to adopting and implementing them, as consistent with our fiduciary responsibilities. We were already adhering to these principles in portfolio construction by making sure to demonstrate a favorable score measured by Truvalue Labs, which uses artificial intelligence to analyze thousands of publications about companies we invest in. We are starting a review of our methods to be at the forefront of best practices. We will keep you up to date!

Discovery Series

In the coming weeks, we will begin publishing a series of short articles surrounding our activities. Our goal is to introduce, while generalizing, the crucial and important steps at Evovest. We'll begin with an introduction to the problem we are trying to solve, the one of active equity asset management, and end with the unique attributes that our investment process demonstrates. We are very happy to introduce you to this initiative which should tell you more about us via publications on LinkedIn and our website. Be sure to follow us (link).

La Presse article

Recently, we had the chance to appear in a local media (link) as part of an interview on the use of artificial intelligence for small investors. We hope to be a player in this market segment in the coming quarters.

Diversity and Inclusion

Having an impact on this issue requires the commitment of our employees. We want to highlight Carl's work with his participation as a Mentor in the Technovation program, which supports entrepreneurship and technology development. With the support of volunteer mentors and parents, the young girls work in teams to code mobile apps that address real-world issues. The mentored team, Womensture (link), finds itself in the world semi-finals.

Don't hesitate to contact us at info@evovest.com

Returns - Global Equity

Stocks and bonds have been down since the start of the year as a rising inflation rate, war in Ukraine, an energy shock and rising recession odds unsettle markets. Despite everything, the Evovest global equity strategy continued to stand out in the circumstances with a performance that outperformed its index for the 3 months of the quarter. A significant portion of this outperformance comes from adjustments to the portfolio's factor positioning, particularly relative to beta. It adapted to market conditions, varying between overweighting and underweighting.

Jan. 31st 2019 - Jun 31th 2022	Evovest	MSCI World EW Net
Annualized returns	8.8%	3.5%
Annualized volatility	14.0%	15.0%
Beta	0.85	N/A
Q2 2022 returns	-9.6%	-13.0%
Tracking error	4.6%	N/A

Warning: The returns presented in CAD include transaction costs but exclude management and operating fees. Past performance is not indicative of future results.