

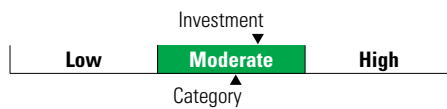
# Fidelity ClearPath<sup>®</sup> 2060 Fund

**Fund Category**  
2035+ Target Date Portfolio

## General Information

Fund Code	395/0395
Fund Inception	January 2020
Underlying Inception	May 2018
Fund Assets (\$Mil)	9.13
Underlying Assets (\$Mil)	517.10
Fund Company	Fidelity Investments Canada ULC
Underlying Fund	Fidelity ClearPath 2060 Portfolio O

## Volatility Analysis



## Investment Objective

Until its target retirement date, this Fund aims to provide a high total return by investing primarily in underlying funds and by using a dynamic asset allocation strategy with a risk level that is in line with its time horizon. Thereafter, the Fund aims to provide current income and, as secondary objective, capital appreciation.

## Benchmark

Not Available

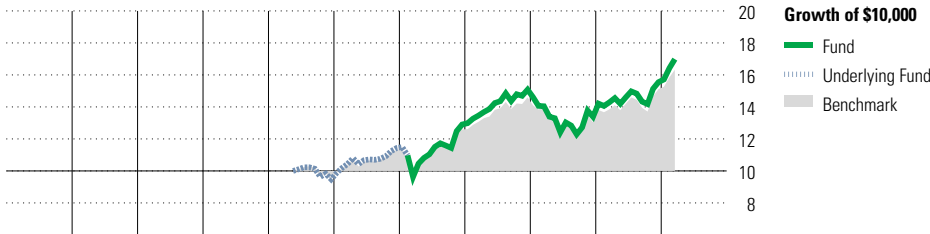
## Investment Strategy

Until its target retirement date, provide a high total return by investing primarily in underlying funds and by using a dynamic asset allocation strategy with a risk level that is in line with its time horizon. Thereafter, provide current income and, as secondary objective, capital appreciation.

## Notes

ClearPath<sup>®</sup> is a registered trademark of FMR Corp. Used with permission.

## Performance Analysis as of March 31, 2024



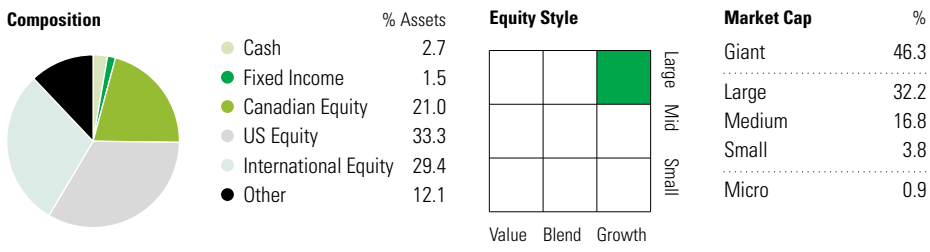
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	YTD	Calendar Year
Fund Return %	—	—	—	—	—	20.7	15.6	16.9	-11.3	16.2	9.3	as at March 31, 2024
Benchmark %	—	—	—	—	—	19.6	11.6	15.9	-10.6	15.9	8.0	

Annualized Returns %	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	9.3	18.9	10.0	8.1	15.3	10.8	—
Benchmark	8.0	17.9	8.2	7.7	14.3	9.5	—

Underlying Fund Performance

**Disclosure** The above data represents past performance returns, which is not indicative of future results. These are gross performance returns, calculated after the fund's operating expenses, but before investment fees. For more information, please contact Desjardins Insurance's Customer Contact Centre at 1-800-968-3587.

## Portfolio Analysis as of March 31, 2024



## Top 10 Holdings

Top 10 Holdings	% Assets
Intl Eq Investment Tr - O	7.8
Fidelity Cdn Govt Long Bd Index Multi As	3.7
Meta Platforms Inc Class A	2.0
Taiwan Semiconductor Manufacturing	1.6
Microsoft Corp	1.6
NVIDIA Corp	1.5
Canadian National Railway Co	1.3
Amazon.com Inc	1.1
Samsung Electronics Co Ltd	1.0
Royal Bank of Canada	1.0
Total Number of Portfolio Holdings	3
Total Number of Underlying Holdings	2,622
Total Number of Stock Holdings	812
Total Number of Bond Holdings	1,474

## Top Five Countries

Top Five Countries	% Assets
United States	39.8
Canada	25.0
China	4.4
United Kingdom	4.1
France	3.0

## Global Equity Sectors

Global Equity Sectors	% Equity
Utilities	1.8
Energy	5.6
Financials	19.8
Materials	6.9
Consumer Discretionary	10.3
Consumer Staples	5.5
Communication Services	7.2
Industrials	14.7
Health Care	8.9
Information Technology	18.2
Real Estate	1.1
Unclassified	0.0