

# Fidelity ClearPath<sup>®</sup> Institutional 2050

## Fund Category

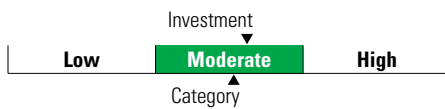
2035+ Target Date Portfolio

## General Information

Fund Code 940/0940/T340  
Fund Inception June 2019  
Underlying Inception June 2011  
Fund Assets (\$Mil) 242.87  
Underlying Assets (\$Mil) 707.31

Fund Company Fidelity Investments Canada ULC  
Underlying Fund Fidelity ClearPath Inst 2050 Portfolio

## 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

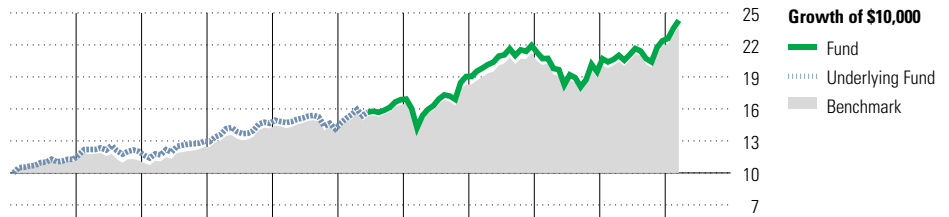
## Investment Strategy

Until its target retirement date, this Fund aims to provide a high total return with a risk level that is in line with its time horizon by investing in underlying funds that hold a mix of equities, fixed-income instruments and alternative investments. Thereafter, the Fund aims to provide current income and, as secondary objective, capital appreciation. The Fund is intended for investors who had or are planning to begin drawing income from their savings between 2048 and 2052. Over time, the portfolio is rebalanced to reflect a decreasing tolerance for portfolio volatility.

## Notes

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## Performance Analysis as of March 31, 2024



Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	YTD	Calendar Year
Fund Return %	12.8	6.5	7.9	13.0	-3.6	19.5	12.9	15.3	-11.3	15.0	8.5	as at March 31, 2024
Benchmark %	11.1	0.6	11.5	13.8	-3.4	19.5	11.8	16.1	-10.8	15.7	8.1	

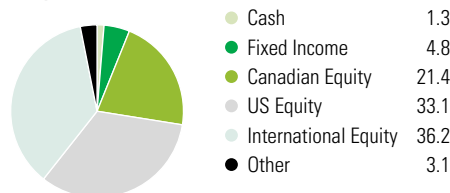
Annualized Returns %	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	8.5	17.8	8.2	7.0	14.3	9.5	8.7
Benchmark	8.1	17.8	8.0	7.6	14.3	9.5	8.4

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

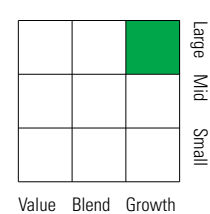
### Composition



### Top 10 Holdings

Holder	% Assets
Select Eme Instl Trust	2.4
Constellation Software Inc	1.5
Canadian National Railway Co	1.5
Microsoft Corp	1.4
Royal Bank of Canada	1.4
NVIDIA Corp	1.2
Canadian Natural Resources Ltd	1.2
Apple Inc	1.0
Taiwan Semiconductor Manufacturing	0.9
Shopify Inc Reg Shs -A- Subord Vtg	0.9
Total Number of Portfolio Holdings	3
Total Number of Underlying Holdings	8,119
Total Number of Stock Holdings	7,074
Total Number of Bond Holdings	558

### Equity Style



### Market Cap

Market Cap	%
Giant	41.1
Large	33.2
Medium	19.0
Small	5.8
Micro	0.8

### Top Five Countries

Country	% Assets
United States	36.5
Canada	23.6
Japan	6.4
United Kingdom	5.1
France	4.0

### Global Equity Sectors

Sector	% Equity
Utilities	2.6
Energy	6.5
Financials	21.0
Materials	6.1
Consumer Discretionary	9.6
Consumer Staples	5.9
Communication Services	5.2
Industrials	14.8
Health Care	8.3
Information Technology	17.6
Real Estate	2.5
Unclassified	0.0