

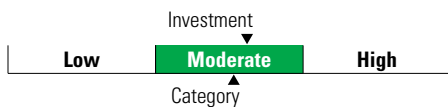
# Fidelity ClearPath<sup>®</sup> Institutional 2060

**Fund Category**  
2035+ Target Date Portfolio

## General Information

Fund Code	984/0984/T384
Fund Inception	June 2019
Underlying Inception	November 2017
Fund Assets (\$Mil)	42.17
Underlying Assets (\$Mil)	203.36
Fund Company	Fidelity Investments Canada ULC
Underlying Fund	Fidelity ClearPath Inst 2060 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

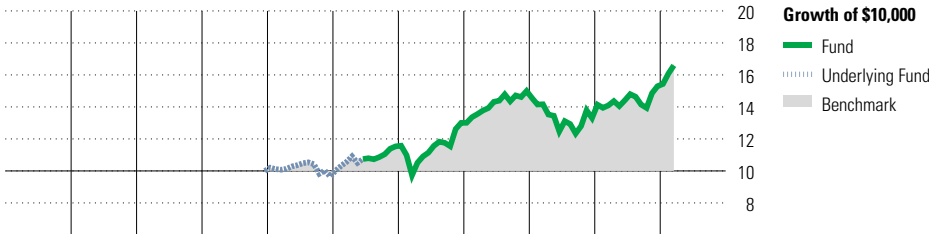
## Investment Strategy

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 2058 and 2062. 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



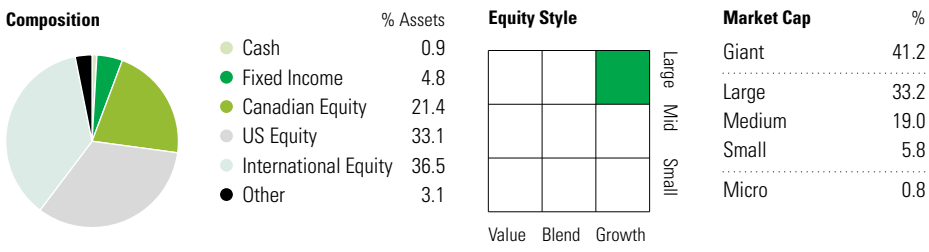
Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	YTD	Calendar Year
Fund Return %	—	—	—	—	-3.5	19.6	12.7	15.3	-11.3	14.9	8.5	as at March 31, 2024
Benchmark %	—	—	—	—	-3.4	19.5	11.8	16.1	-10.8	15.7	8.1	

Annualized Returns %	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	8.5	17.7	8.2	7.0	14.3	9.5	—
Benchmark	8.1	17.8	8.0	7.6	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	% Assets	Top Five Countries	% Assets
Fidelity Series Emerging Markets Opps	9.6	United States	36.4
Fidelity Value Discovery	3.7	Canada	23.5
Select Eme Instl Trust	2.4	Japan	6.4
Constellation Software Inc	1.5	United Kingdom	5.1
Canadian National Railway Co	1.5	France	4.0
Microsoft Corp	1.4		
Royal Bank of Canada	1.4		
NVIDIA Corp	1.2		
Canadian Natural Resources Ltd	1.2		
Apple Inc	1.0		

Global Equity Sectors	% Equity
Utilities	2.6
Energy	6.5
Financials	20.9
Materials	6.1
Consumer Discretionary	9.6
Consumer Staples	5.9
Communication Services	5.2
Industrials	14.7
Health Care	8.3
Information Technology	17.6
Real Estate	2.5
Unclassified	0.0