

# Fidelity ClearPath® 2060 Fund

**Fund Category**  
2045+ Target Date Portfolio

## General Information

Fund Code	395/0395
Fund Inception	January 2020
Underlying Inception	May 2018
Fund Assets (\$Mil)	20.73
Underlying Assets (\$Mil)	688.92
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

Blended benchmark rebalanced periodically to reflect a decreasing risk tolerance

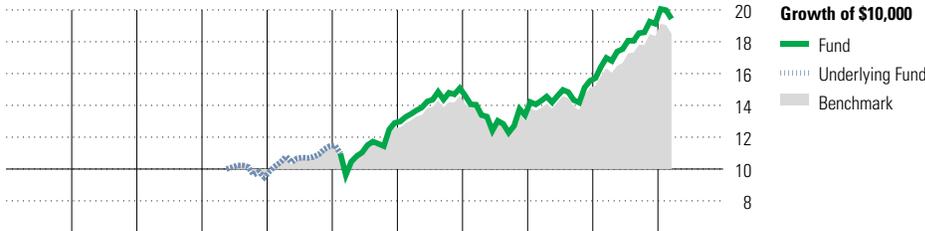
## Investment Strategy

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® is a registered trademark of FMR Corp. Used with permission.

## Performance Analysis as of March 31, 2025



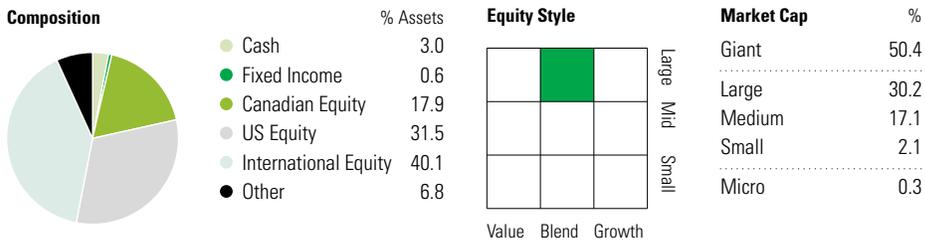
Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YTD	Calendar Year
Quartile	—	—	—	—	—	—	—	—	—	—	—	as at March 31, 2025
Fund Return %	—	—	—	—	20.7	15.6	16.9	-11.3	16.2	23.0	1.6	as at March 31, 2025
Benchmark %	—	—	—	—	19.6	11.6	15.9	-10.6	15.9	21.5	0.8	as at March 31, 2025

Annualized Returns %	1 Mth	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	-2.7	1.6	14.4	16.6	11.4	9.6	15.1	—
Benchmark	-2.9	0.8	13.3	15.6	9.9	9.1	14.1	—

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, 2025



Top 10 Holdings	% Assets	Top Five Countries	% Assets
Fidelity Invts Cda ULC	3.1	United States	34.8
Fidelity Invts Cda ULC	3.0	Canada	20.9
NVIDIA Corp	2.0	United Kingdom	6.4
Meta Platforms Inc Class A	1.8	China	5.5
Apple Inc	1.7	Japan	5.1
Amazon.com Inc	1.5		
Taiwan Semiconductor Manufacturing	1.4	<b>Global Equity Sectors</b>	% Equity
Tencent Holdings Ltd	1.3	Utilities	1.5
The Toronto-Dominion Bank	1.3	Energy	5.2
Royal Bank of Canada	1.2	Financials	23.2
Total Number of Portfolio Holdings	3	Materials	7.2
Total Number of Underlying Holdings	2,717	Consumer Discretionary	9.8
Total Number of Stock Holdings	945	Consumer Staples	4.6
Total Number of Bond Holdings	1,380	Communication Services	7.6
		Industrials	15.4
		Health Care	7.0
		Information Technology	17.8
		Real Estate	0.7
		Unclassified	0.0