

# Fidelity ClearPath® Index Plus Institutional 2030

## Fund Category

2030 Target Date Portfolio

## General Information

Fund Code 628  
Fund Inception June 2024  
Underlying Inception February 2024  
Fund Assets (\$Mil) 0.24  
Underlying Assets (\$Mil) 39.60

Fund Company Fidelity Investments Canada ULC  
Underlying Fund Fidelity ClearPath Idx Plus Ins 2030 Ptf

## Volatility Analysis

Low	Moderate	High
	▲	
Category		

## 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

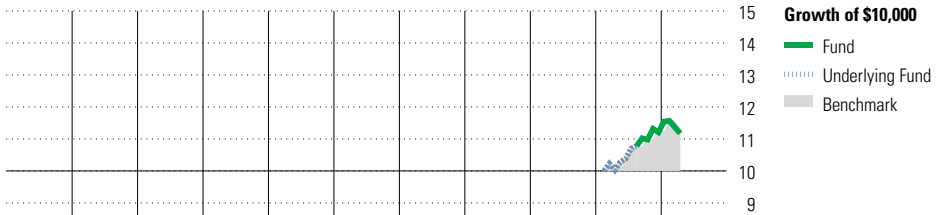
## Investment Strategy

Until its target retirement date, this fund aims to provide a high total return with a risk level that is in line with its time horizon by investing primarily in fixed-income and equity index strategies, with an exposure to 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 2028 and 2032. Over time, the portfolio is rebalanced to reflect a decreasing tolerance for portfolio volatility.

## Notes

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## Performance Analysis as of April 30, 2025



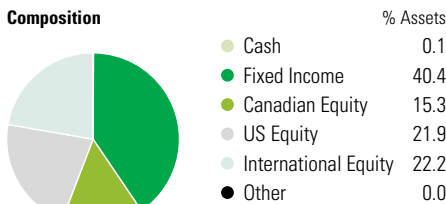
2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YTD	Calendar Year
—	—	—	—	—	—	—	—	—	—	-0.3	as at April 30, 2025
—	—	—	—	—	—	—	—	—	—	-0.3	Fund Return %
—	—	—	—	—	—	—	—	—	—	-0.3	Benchmark %

Annualized Returns %	1 Mth	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	-1.7	-3.2	11.1	—	—	—	—	—
Benchmark	-1.4	-3.3	11.0	—	—	—	—	—

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 April 30, 2025



Top Five Countries	% Assets
United States	36.9
Canada	25.8
Japan	5.6
United Kingdom	3.8
China	3.7

Top 10 Holdings	% Assets
Apple Inc	1.3
Microsoft Corp	1.1
NVIDIA Corp	1.1
Royal Bank of Canada	1.0
Canada (Government of) 4% 01-12-2031	0.8
Amazon.com Inc	0.7
Shopify Inc Reg Shs -A- Subord Vtg	0.7
Canada (Government of) 1.5% 01-12-2044	0.7
Canada (Government of) 3% 01-12-2036	0.7
Canada (Government of) 2% 01-12-2041	0.6
Total Number of Portfolio Holdings	3
Total Number of Underlying Holdings	6,921
Total Number of Stock Holdings	5,702
Total Number of Bond Holdings	893

## Equity Style

Value	Blend	Growth	Large	Mid	Small

Global Equity Sectors	% Equity
Utilities	3.1
Energy	7.2
Financials	22.7
Materials	6.5
Consumer Discretionary	8.9
Consumer Staples	5.8
Communication Services	6.3
Industrials	12.0
Health Care	7.9
Information Technology	17.4
Real Estate	2.2
Unclassified	0.0

Fixed Income Breakdown	% Bond
Government Bonds	90.7
Corporate Bonds	9.0
Other Bonds	0.0
Mortgage Backed Securities	0.0
ST Investments (Cash & Other)	0.7
Asset Backed Securities	0.0