

Fidelity ClearPath® Index Plus Institutional 2035

Fund Category

2035 Target Date Portfolio

General Information

Fund Code	629
Fund Inception	June 2024
Underlying Inception	February 2024
Fund Assets (\$Mil)	0.28
Underlying Assets (\$Mil)	43.10
Fund Company	Fidelity Investments Canada ULC
Underlying Fund	Fidelity ClearPath Idx Plus Ins 2035 Ptf

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

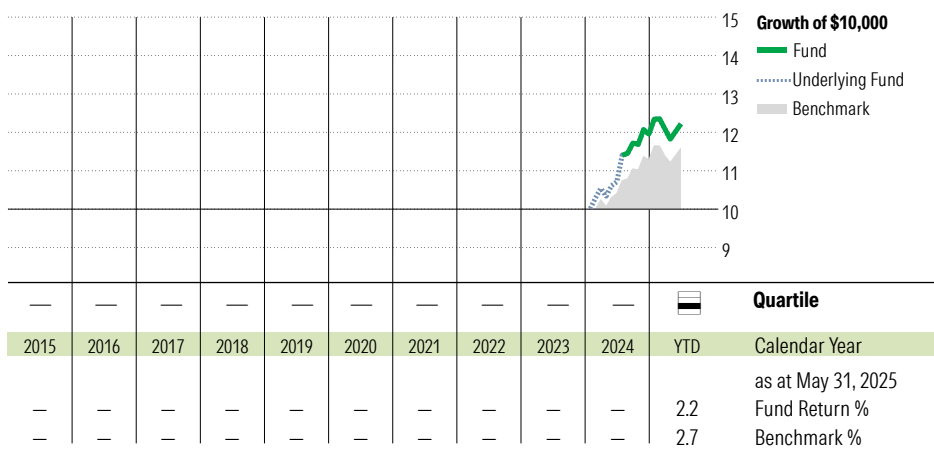
Investment Strategy

Until its target retirement date, 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 2033 and 2037. Over time, the portfolio is rebalanced to reflect a decreasing tolerance for portfolio volatility.

Notes

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Performance Analysis as of May 31, 2025



Annualized Returns %	1 Mth	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	3.4	-1.1	12.3	-	-	-	-	-
Benchmark	3.4	-0.5	12.5	-	-	-	-	-
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 May 31, 2025

Composition		% Assets	Equity Style		
	Cash	1.0		Large	Mid
	Fixed Income	30.5			
	Canadian Equity	17.5			
	US Equity	25.7			
	International Equity	25.2			
	Other	0.1			
Top Five Countries		% Assets	Global Equity Sectors		
United States		37.6	Utilities		
Canada		25.6	Energy		
Japan		5.6	Financials		
United Kingdom		3.8	Materials		
China		3.4	Consumer Discretionary		
			Consumer Staples		
			Communication Services		
			Industrials		
			Health Care		
			Information Technology		
			Real Estate		
			Unclassified		
Top 10 Holdings		% Assets	Fixed Income Breakdown		
Apple Inc		1.5	Government Bonds		
Microsoft Corp		1.4	Corporate Bonds		
NVIDIA Corp		1.3	Other Bonds		
Royal Bank of Canada		1.1	Mortgage Backed Securities		
Amazon.com Inc		0.8	ST Investments (Cash & Other)		
Shopify Inc Registered Shs -A- Subord Vtg		0.8	Asset Backed Securities		
The Toronto-Dominion Bank		0.7			
Taiwan Semiconductor Manufacturing		0.7			
Enbridge Inc		0.7			
Meta Platforms Inc Class A		0.6			
Total Number of Portfolio Holdings		3			
Total Number of Underlying Holdings		6,831			
Total Number of Stock Holdings		5,681			
Total Number of Bond Holdings		827			