

# Fidelity ClearPath® Institutional 2055

## Fund Category

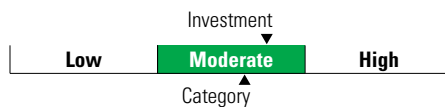
2045+ Target Date Portfolio

## General Information

Fund Code 941/0941/T341  
Fund Inception June 2019  
Underlying Inception October 2012  
Fund Assets (\$Mil) 153.27  
Underlying Assets (\$Mil) 608.84

Fund Company Fidelity Investments Canada ULC  
Underlying Fund Fidelity ClearPath Inst 2055 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

Blended benchmark rebalanced periodically to reflect a decreasing risk tolerance

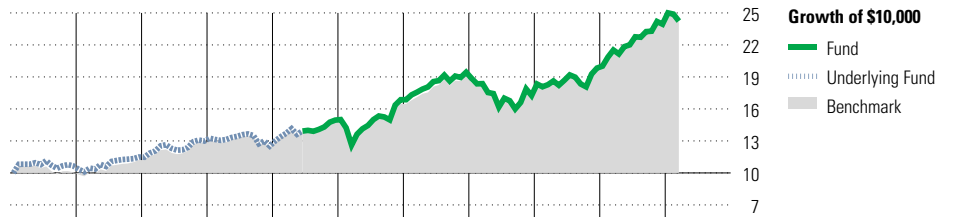
## Investment Strategy

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 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 2053 and 2057. 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, 2025



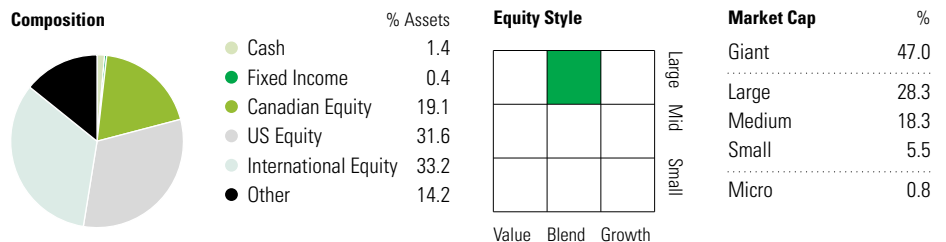
											Quartile
2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	YTD	Calendar Year
6.5	7.9	13.0	-3.6	19.5	12.8	15.3	-11.2	14.9	20.7	1.2	as at March 31, 2025
0.6	11.5	13.8	-3.4	19.5	11.8	16.1	-10.8	15.7	21.6	0.5	Fund Return %
											Benchmark %

Annualized Returns %	1 Mth	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	-2.6	1.2	12.6	15.2	9.7	8.4	14.0	8.4
Benchmark	-2.7	0.5	13.1	15.4	9.7	9.0	14.1	8.6

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
Intl Value Inst Trust	4.6	United States	37.7
Can Equity Instl Trust	4.6	Canada	22.8
Int Dev Mkt Inst	4.4	Japan	5.1
Fidelity Large Cap Stock	3.9	China	5.0
Apple Inc	1.5	United Kingdom	4.9

Global Equity Sectors	% Equity
Utilities	2.1
Energy	6.3
Financials	22.8
Materials	6.1
Consumer Discretionary	9.7
Consumer Staples	4.3
Communication Services	6.4
Industrials	13.7
Health Care	7.3
Information Technology	19.3
Real Estate	1.9
Unclassified	0.0