

# Fidelity ClearPath<sup>®</sup> Institutional 2035

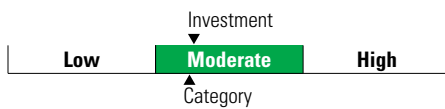
**Fund Category**  
2035 Target Date Portfolio

## General Information

Fund Code 937/0937/T337  
Fund Inception June 2019  
Underlying Inception March 2008  
Fund Assets (\$Mil) 388.19  
Underlying Assets (\$Mil) 1,205.58

Fund Company Fidelity Investments Canada ULC  
Underlying Fund Fidelity Clearpath Inst 2035 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

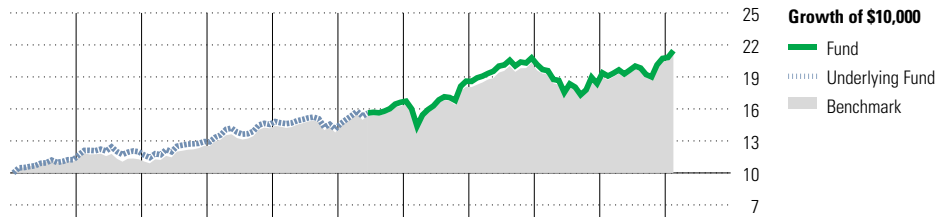
## Investment Strategy

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 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 February 29, 2024



Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	YTD	Calendar Year
Fund	12.4	6.6	8.0	12.5	-3.0	17.8	11.9	11.7	-11.6	12.8	3.5	as at February 29, 2024
Underlying Fund	10.9	1.7	11.2	13.0	-2.7	17.9	11.2	12.4	-11.3	13.4	3.3	Fund Return %
Benchmark												Benchmark %

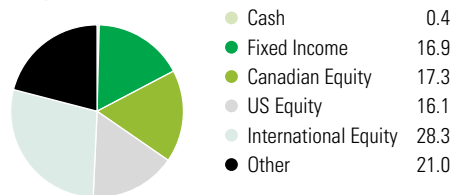
Annualized Returns %	3 Mth	1 Yr	2 Yr	3 Yr	4 Yr	5 Yr	10 Yr
Fund	6.6	12.5	4.4	4.3	7.6	7.4	7.4
Benchmark	6.5	12.9	4.6	5.0	7.8	7.5	7.3

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 February 29, 2024

### Composition



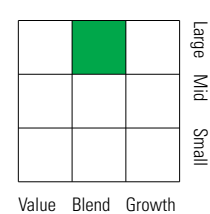
### Top Five Countries

Country	% Assets
Canada	28.0
United States	26.1
Japan	7.1
United Kingdom	5.7
France	4.5

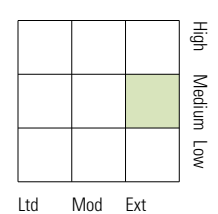
### Top 10 Holdings

Holder	% Assets
Fidelity Global Developed Mkts Sovereign	11.9
Fidelity U.S. Equity Index Ins Trust	6.6
Fidelity Value Discovery	2.4
Select Eme Instl Trust	1.9
Constellation Software Inc	1.2
Royal Bank of Canada	1.2
Canadian National Railway Co	1.1
Canadian Natural Resources Ltd	0.9
Shopify Inc Reg Shs -A- Subord Vtg	0.7
The Toronto-Dominion Bank	0.7
Total Number of Portfolio Holdings	3
Total Number of Underlying Holdings	5,265
Total Number of Stock Holdings	4,226
Total Number of Bond Holdings	558

### Equity Style



### Fixed Income Style



### Global Equity Sectors

Sector	% Equity
Utilities	3.0
Energy	6.8
Financials	22.0
Materials	7.1
Consumer Discretionary	9.5
Consumer Staples	5.9
Communication Services	5.1
Industrials	14.4
Health Care	7.8
Information Technology	15.8
Real Estate	2.6
Unclassified	0.0

### Fixed Income Breakdown

Category	% Bond
Government Bonds	74.1
Corporate Bonds	21.8
Other Bonds	0.0
Mortgage Backed Securities	1.6
ST Investments (Cash & Other)	2.1
Asset Backed Securities	0.4