

We believe that when you stay ahead of change, you can accelerate your dreams. At Fidelity, our mission is to help driven Canadians reach their goals faster than they thought possible.

For **38 years**, we have been designing an array of innovative products to help build better financial futures for investors like you.

Why choose Fidelity?

A **privately owned** company that's committed to performance and investor success.

SINCE
1987
IN CANADA

We do what's best for our clients, not shareholders.

Over
29,000
advisors **and**
2M
investors
invest with us in Canada.

Around
\$285B
IN ASSETS UNDER
MANAGEMENT IN CANADA.



Fidelity Canada Investment Management is a
59-member team
of portfolio managers, analysts and traders based in Canada.

16

Equity portfolio managers

20

Equity research associates and analysts

2

Credit portfolio managers

9

Credit research associates and analysts

12

Trading team members

2,379

Canadian employees with dedicated offices in **Toronto, Calgary, Vancouver** and **Montreal.**



Our portfolio managers take an **active approach to investing**, visiting companies and meeting with management.



We take a long-term view with our plans and are not focused solely on short-term results.



We're invested in proprietary research, bottom-up fundamental analysis, product innovation and our people.

IN
1946

Fidelity Management & Research Company (FMR) is founded.

A world of opportunity

With Fidelity, you're getting access not just to one of Canada's leading investing teams but to a global network of research professionals and innovators.



Investment professional count of subadvisors

• **57** | FOUNDED IN 1987

• **378** | FOUNDED IN 1969

• **758** | FOUNDED IN 1946

• **35** | FOUNDED IN 2001

Fidelity Investments Canada ULC (FIC) brings a global network of investment expertise to Canadian investors. Our products are advised by our investment division, Fidelity Canada Investment Management, and subadvised by a variety of companies, as applicable, including Fidelity Management & Research Company LLC (FMR), FIAM LLC (FIAM), Fidelity Management & Research (Canada) ULC* (FMR-Canada), Fidelity International Limited (FIL Limited) and Geode Capital Management, LLC (Geode). Investment professional counts include portfolio managers, research analysts and associates and traders only.

Source: FMR, FIAM, FIL Limited, FIC, FMR-Canada and Geode as at March 31, 2024. Data are unaudited. Figures for investment professionals do not include Division Management and Other Investment.

* Carrying on business in British Columbia as FMR Investments Canada ULC.

Start accelerating your dreams with Fidelity. Talk to your financial advisor, or visit [fidelity.ca](https://www.fidelity.ca)

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