



Accelerate
your
dreams™
with Fidelity.



We believe that when you stay ahead of change, you can accelerate your dreams.

Since 1987, our mission has been to help driven Canadians reach their goals faster than they ever thought possible.

HOW CAN FIDELITY HELP?



Expert insights, tools and services to help you make smarter decisions with your money and stay ahead of a rapidly changing world.



An innovative and comprehensive suite of investment solutions, backed by cutting-edge technology and a global network of research analysts.



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

WHY CHOOSE FIDELITY?



2 million
Canadian investors
invest with us.



We have
2,379
Canadian employees
with dedicated offices in
**Toronto, Calgary,
Vancouver and Montreal.**

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

Helping you reach your financial goals is at the heart of what we do.

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

Helping investors build better financial futures has always been at the core of our business. We're here to help you make smarter decisions with your money, stay ahead of change and achieve your financial goals faster than you ever thought possible. As a privately owned firm, we focus on what's best for you, our clients, not shareholders. We're invested in proprietary research, bottom-up fundamental analysis, product innovation and our people. Fidelity maintains the same beliefs and practices that have allowed it to grow and succeed: a culture of integrity, a commitment to performance and a dedication to clients.

We are globally aligned and locally driven.

Through Fidelity's extensive global network, we gain access to a wide array of products, tools and insights. With investment professionals worldwide exchanging insights, Fidelity takes unique local market knowledge, identifies real investment opportunities and makes them available to you here at home.

Integrated risk management system

Fidelity monitors portfolios constantly. Investment professionals monitor portfolio positions and weightings to ensure they are not only well thought out but are also appropriate to each fund's investment mandate.

A commitment to performance

At Fidelity, we believe better research drives long-term performance. Building on fundamental, bottom-up research, we seek to create the competitive advantage and intelligent insight that are needed to deliver strong long-term returns for our clients.

Equity

Fidelity is known for stock picking, but investment professionals must also consider a portfolio's liquidity, volatility and overall composition. Fidelity constantly analyzes the risks that lie in the mix of sectors, currencies, regions and style factors, using various tools to keep them consistent with investment mandates.

Fixed income

Fidelity's 360-degree team-based approach to fixed income investing helps investment professionals gain insight into companies by combining views from both equity and credit research when making investment decisions for our clients – a key element in navigating broad and diverse market conditions.

Asset allocation

Our Global Asset Allocation team provides investment value through research, portfolio construction, risk management and ongoing asset allocation. The team partners closely with portfolio managers to provide key insights at the macroeconomic, quantitative and fundamental levels, while tapping into the knowledge of Fidelity's equity and fixed income research professionals across the globe.

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


• **58** | FOUNDED IN
1987


• **332** | FOUNDED IN
1969


• **764** | FOUNDED IN
1946


• **36** | 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, 2025. 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

Commissions, trailing commissions, management fees, brokerage fees and expenses may be associated with investments in mutual funds and ETFs. Please read the mutual fund's or ETF's prospectus, which contains detailed investment information, before investing. Mutual funds and ETFs are not guaranteed. Their values change frequently, and investors may experience a gain or a loss. Past performance may not be repeated.



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