



## Fidelity Funds recognized for delivering consistently strong risk-adjusted performance with multiple 2021 Lipper Fund Awards

TORONTO, November 17, 2021 - The Canadian 2021 Lipper Fund Awards recognized several mutual funds managed by Fidelity Investments Canada ULC (Fidelity), one of Canada's leading investment managers, for delivering consistently strong risk-adjusted performance relative to their peers. In total, 12 Fidelity mutual funds won 15 Lipper Fund Awards across multiple time periods and investment categories.

"We are very proud to once again be recognized at the Canadian Lipper Fund Awards," said Kelly Creelman, SVP Products, Fidelity Investments Canada ULC. "In a climate of continued uncertainty with the pandemic, our team remained focused on our mission to strive to deliver strong, long-term performance for Fidelity's securityholders. The breadth of products across various fund classifications being recognized is a testament to the strength of Fidelity's fundamental, bottom-up research and vast global resources."

Fund Name	Portfolio Manager(s)	Classification	Award Period(s)
Fidelity Global Growth Portfolio	Geoff Stein, David Wolf and David Tulk	Global Equity Balanced	10 Years
Fidelity Global Income Portfolio	Geoff Stein, David Wolf and David Tulk	Global Fixed Income Balanced	10 Years
Fidelity Greater Canada Fund	Hugo Lavallée	Canadian Focused Sm/Mid Cap Eq	3 and 5 Years
Fidelity Canadian Opportunities Fund	Hugo Lavallée	Canadian Equity	3, 5 and 10 Years
Fidelity Emerging Markets Fund	Sam Polyak	Emerging Markets Equity	5 Years
Fidelity ClearPath 2025 Portfolio	Andrew Dierdorf, Brett Sumsion and Bruno Crocco	2025 Target Date Portfolio	3 Years
Fidelity ClearPath 2030 Portfolio	Andrew Dierdorf, Brett Sumsion and Bruno Crocco	2030 Target Date Portfolio	3 Years
Fidelity ClearPath 2060 Portfolio	Andrew Dierdorf, Brett Sumsion and Bruno Crocco	2035+ Target Date Portfolio	3 Years
Fidelity Tactical High Income Fund	Adam Kramer, Ramona Persaud and Ford O'Neil	Tactical Balanced	5 Years
Fidelity Tactical High Income Currency Neutral Fund	Adam Kramer, Ramona Persaud and Ford O'Neil	Tactical Balanced	3 Years
Fidelity North American Equity Class	Darren Lekkerkerker	North American Equity	3 Years
Fidelity Global Real Estate Fund	Steve Buller	Real Estate Equity	10 Years

"Congratulations to all the Fidelity portfolio managers on their achievements in delivering consistently strong risk-adjusted performance over these periods," said Creelman. "Your dedication, commitment and always acting in the best interest of unitholders should be

commended. As well, thank you to Canadian advisors and investors for their trust and support."

For a full list of this year's winners, please visit the Lipper Fund Awards [website](#).

### **About Refinitiv Lipper Fund Awards**

For more than 30 years and in over 17 countries worldwide, the highly-respected Refinitiv Lipper Awards have honoured funds and fund management firms that have excelled in providing consistently strong risk-adjusted performance relative to their peers and focus the investment world on top-funds. The merit of the winners is based on entirely objective, quantitative criteria. This coupled with the unmatched depth of fund data, results in a unique level of prestige and ensures the award has lasting value. Renowned fund data and proprietary methodology is the foundation of this prestigious award qualification, recognizing excellence in fund management. The Refinitiv Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers.

The Refinitiv Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is a risk-adjusted performance measure calculated over 36, 60 and 120 months. The highest 20% of funds in each category are named Lipper Leaders for Consistent Return and receive a score of 5, the next 20% receive a score of 4, the middle 20% are scored 3, the next 20% are scored 2, and the lowest 20% are scored 1. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification per award universe wins the Refinitiv Lipper Fund Award. For more information, see [www.lipperfundawards.com](http://www.lipperfundawards.com). Although Refinitiv Lipper makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Refinitiv Lipper.

### **About Fidelity Investments Canada ULC**

At Fidelity, our mission is to build a better future for Canadian investors and help them stay ahead. We offer investors and institutions a range of innovative and trusted investment portfolios to help them reach their financial and life goals.

As a privately-owned company, our people and world class resources are committed to doing what is right for investors and their long-term success. Our clients have entrusted us with \$209 billion in assets under management (as at November 10, 2021) and they include individuals, financial advisors, pension plans, endowments, foundations and more.

We are proud to provide investors a full range of investment solutions through mutual funds and exchange-traded funds, including domestic, international and global equity, income-oriented strategies, asset allocation solutions, managed portfolios, sustainable investing and our high net worth program. Fidelity Funds are available through a number of advice-based

distribution channels including financial planners, investment dealers, banks, and insurance companies.

#### **Fidelity Global Growth Portfolio**

Fidelity Global Growth Portfolio (Series F), best fund in the Global Equity Balanced category over the past ten-year period ending July 31, 2021, out of a total of 90 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 22.82% (one year), 14.70% (three years), 11.35% (five years), 12.13% (ten years) and 7.70% (since inception April 2007).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), 5 (ten years).

#### **Fidelity Global Income Portfolio**

Fidelity Global Income Portfolio (Series F), best fund in the Global Fixed Income Balanced category over the past ten-year period ending July 31, 2021, out of a total of 29 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 9.15% (one year), 7.70% (three years), 5.47% (five years), 7.15% (ten years) and 5.66% (since inception April 2007).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), 5 (ten years).

#### **Fidelity Greater Canada Fund**

Fidelity Greater Canada Fund (Series F), best fund in the Canadian Focused Sm/Mid Cap Eq category over the past three-year and five-year periods ending July 31, 2021, out of a total of 15 and 14 funds, respectively.

Performance for the Fund for the period ended October 31, 2021, is as follows: 48.93% (one year), 33.04% (three years), 20.15% (five years), 17.09% (ten years) and 11.69% (since inception January 2008).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), 4 (ten years).

#### **Fidelity Canadian Opportunities Fund**

Fidelity Canadian Opportunities Fund (Series F), best fund in the Canadian Equity category over the past three-year, five-year and ten-year periods ending July 31, 2021, out of a total of 84, 77 and 61 funds, respectively.

Performance for the Fund for the period ended October 31, 2021, is as follows: 39.81% (one year), 24.55% (three years), 15.66% (five years), 12.89% (ten years) and 10.93% (since inception October 2000).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), 5 (ten years).

#### **Fidelity Emerging Markets Fund**

Fidelity Emerging Markets Fund (Series F), best fund in the Emerging Markets Equity category over the past five-year period ending July 31, 2021, out of a total of 28 funds

Performance for the Fund for the period ended October 31, 2021, is as follows: 11.37% (one year), 16.84% (three years), 11.63% (five years), 8.48% (ten years) and 7.05% (since inception October 2000).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), 5 (ten years).

#### **Fidelity ClearPath 2025 Portfolio**

Fidelity ClearPath® 2025 Portfolio (Series F), best fund in the 2025 Target Date Portfolio category over the past three-year period ending July 31, 2021, out of a total of 11 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 15.62% (one year), 10.81% (three years), 8.00% (five years), 8.78% (ten years) and 7.31% (since inception November 2005).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 4 (five years), 5 (ten years).

#### **Fidelity ClearPath 2030 Portfolio**

Fidelity ClearPath® 2030 Portfolio (Series F), best fund in the 2030 Target Date Portfolio category over the past three-year period ending July 31, 2021, out of a total of 10 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 18.74% (one year), 11.85% (three years), 8.77% (five years), 9.34% (ten years) and 7.61% (since inception November 2005).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 4 (five years), 5 (ten years).

#### **Fidelity ClearPath 2060 Portfolio**

Fidelity ClearPath® 2060 Portfolio (Series F), best fund in the 2035+ Target Date Portfolio category over the past three-year period ending July 31, 2021, out of a total of 15 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 27.71% (one year), 14.88% (three years), and 11.35% (since inception May 2018).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), n/a (five years), n/a (ten years).

#### **Fidelity Tactical High Income Fund**

Fidelity Tactical High Income Fund (Series F), best fund in the Tactical Balanced category over the past five-year period ending July 31, 2021, out of a total of 48 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 20.11% (one year), 14.56% (three years), 9.19% (five years), n/a (ten years) and 10.80% (since inception May 2014).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), n/a (ten years).

#### **Fidelity Tactical High Income Currency Neutral Fund**

Fidelity Tactical High Income Currency Neutral Fund (Series F), best fund in the Tactical Balanced category over the past three-year period ending July 31, 2021, out of a total of 50 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 28.23% (one year), 15.73% (three years), 9.94% (five years), n/a (ten years) and 8.33% (since inception May 2014).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), n/a (ten years).

#### **Fidelity North American Equity Class**

Fidelity North American Equity Class (Series F), best fund in the North American Equity category over the past three-year period ending July 31, 2021, out of a total of 20 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 33.86% (one year), 21.64% (three years), 16.62% (five years) and 14.34% (since inception October 2015).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 5 (three years), 5 (five years), n/a (ten years).

#### **Fidelity Global Real Estate Fund**

Fidelity Global Real Estate Fund (Series F), best fund in the Real Estate Equity category over the past ten-year period ending July 31, 2021, out of a total of 11 funds.

Performance for the Fund for the period ended October 31, 2021, is as follows: 29.22% (one year), 10.13% (three years), 7.38% (five years), 11.13% (ten years) and 5.59% (since inception May 2006).

The corresponding Lipper Leader ratings of the Fund for the same period are as follows: N/A (one year), 3 (three years), 3 (five years), 5 (ten years).

Commissions, trailing commissions, management fees, brokerage fees and expenses may be associated with investments in mutual funds and ETFs. Please read the mutual fund or ETF's prospectus, which contains detailed investment information, before investing. The indicated rates of return are historical annual compounded total returns for the period indicated including changes in unit value and reinvestment of distributions. The indicated rates of return do not take into account sales, redemption, distribution or option charges or income taxes payable by any unitholder that would have reduced returns. 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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