



Financial advisors focused on keeping investors on track amidst geopolitical concerns, Fidelity Investments Canada polling shows

New findings reveal what's keeping advisors and clients up at night – and where they see upside ahead



Toronto, ON – February 17, 2026 – Fidelity Investments Canada ULC ("Fidelity") today released new findings from its *FidelityConnects* Advisor Pulse Polls, conducted during Fidelity VISION 2026, which brought together more than 6,000 financial advisors, both in person in Toronto and online across the country.

FidelityConnects Advisor Pulse Polls capture real-time sentiment and perspectives from its community of highly engaged financial advisors. They track perspectives on capital markets, technological, regulatory, and business trends shaping the advice industry – along with the challenges and opportunities influencing it today and into the future.

Across every topic polled – from client priorities and conversations to market risks, opportunities, and how advisors are looking to add value in 2026 – one theme rose above all others: geopolitics.

"Advisors told us clearly that geopolitics is the dominant force shaping client sentiment right now," said Chris Pepper, Vice President, Corporate Affairs, Fidelity. "In an environment that feels louder, faster and more unpredictable, advisors are playing a critical role in helping clients stay focused and confident."

Key Findings

Geopolitics emerges as the dominant theme

- 59% of advisors say geopolitics is the macro factor they expect will have the biggest impact on portfolios in 2026, with remaining citing market volatility (17%), inflation (12%), and interest rates (12%).
- 54% also report that geopolitical shocks are the number one concern they're hearing from clients today, with clients also talking about market volatility (25%), recession (13%), AI (6%), and missing the rally (2%).

Advisors focused on keeping clients grounded

- 35% of advisors say helping clients stay on track through volatility is their top priority this year, while retirement planning (24%), risk management (19%), growth strategies (15%), and tax efficiency (7%) continuing to remain a focus.

Portfolio diversification seen as a key value-add

- 61% identify global diversification as their biggest opportunity to add value in 2026 from a portfolio optimization perspective, with many seeing opportunities in factor investing (18%), AI-driven productivity and innovation (15%), and fixed income repositioning (6%).

Growing confidence in Canada

- 26% believe Canada offers the strongest risk return potential over the next five years, citing resilient sectors, strong companies, and solid long-term fundamentals. This represents a significant positive change in confidence in Canada, with just as many believing the U.S. (26%) offers the biggest investment opportunity, followed by emerging markets (23%), Europe (19%), Asia (7%).

"These findings echo what we consistently see across market cycles," added Pepper. "Markets, headlines, and conversations may shift, but one thing remains the same: when uncertainty rises, advisors rise right along with it. Advice has never been more essential, and advisors are staying focused and adding value by helping clients remain disciplined, optimizing their portfolios and identifying opportunities to position them for success in 2026 and over the long term."

These Fidelity*Connects* Advisor Pulse polls were commissioned during the Fidelity Toronto VISION hybrid event on January 28, 2026, with the sample size ranging from 2,500 – 3,100 advisor responses.

About Fidelity*Connects*

For the fifth consecutive year, Fidelity*Connects* by Fidelity Investments Canada has been ranked the #1 webcast and podcast by Canadian financial advisors, according to the 2025 Environics Advisor Digital Experience Study. The recognition highlights Fidelity*Connects*' broad range of timely insights – including perspectives on geopolitics, markets, and the key themes influencing advisor and client decision-making. Episodes are available on all major podcast platforms, including [Spotify](#), [Apple Podcasts](#), [YouTube](#) or wherever you watch or listen.

About Fidelity Investments Canada ULC

At Fidelity Investments Canada, our mission is to build a better future for our clients. Our diversified business serves financial advisors, wealth management firms, employers, institutions and individuals. As the marketplace evolves, we are constantly innovating and offering our clients choice of investment and wealth management products, services and technological solutions all backed by the global strength and scale of Fidelity. With assets under management of \$362 billion (as at February 9, 2026), Fidelity Investments Canada is privately held and committed to helping our diverse clients meet their goals over the long term. Fidelity funds are available through financial advisors and online trading platforms.

Read a fund's prospectus and consult your financial advisor before investing. Exchange-traded funds are not guaranteed; their values change frequently and past performance may not be repeated. Commissions, management fees, brokerage fees and expenses may all be associated with investments in exchange-traded funds and investors may experience a gain or loss.

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