



Fidelity Investments Canada Launches New Fidelity Global Equity Portfolio

~Funds Aim to Offer Investors Diversified Equity Solution~

May 18, 2022, Toronto - Fidelity Investments Canada ULC, one of Canada's leading investment firms, today launched Fidelity Global Equity Portfolio and Fidelity Global Equity Class Portfolio.

"As financial advisors and investors seek increased diversification amid changes in market trends, Fidelity strives to provide a dynamic lineup of investment products to help meet their financial goals," said Kelly Creelman, Senior Vice President, Products and Marketing, Fidelity Investments Canada ULC. "With Fidelity Global Equity Portfolio, we are expanding choice and convenience for investors looking for a diversified equity solution. Managed by Fidelity's Global Asset Allocation Team, the portfolio is designed to offer equity exposure and long-term capital growth."

Fidelity is launching a new managed portfolio, Fidelity Global Equity Portfolio, in addition to a corresponding corporate class version, Fidelity Global Equity Class Portfolio. Managed by Global Asset Allocation portfolio managers Geoff Stein, David Wolf, and David Tulk, the portfolio will aim to achieve long-term capital growth, leveraging Fidelity's deep investment capabilities and diverse lineup of equity portfolio managers. The portfolio is diversified by region, market cap and investment style.

Fidelity Global Equity Portfolio offers several key investor benefits, including:

- **Access to Fidelity's portfolio managers** - Fidelity Global Equity Portfolio has access to Fidelity's equity funds and managers to use as underlying funds, such as exposure to Will Danoff's Insights, Hugo Lavallée's Canadian Opportunities, Don Newman's Dividend, Ramona Persaud's U.S. Dividend and Mark Schmehl's Global Innovators strategies.
- **Diversification across styles and regions** - The portfolio intends to include exposure to Canada, U.S., international, and emerging markets equities in both value and growth investing styles, no matter which is in favour.
- **Leveraging Fidelity's Global Asset Allocation Team and global resources** - The Team manages over \$83 billion in Canadian assets and has access to hundreds of investment professionals around the world to assist in balancing risk and return, as well as Fidelity's trusted approach including our vast global research network and proprietary research.

For more information, visit [fidelity.ca](https://www.fidelity.ca)

Geoff Stein

Geoff Stein is a portfolio manager in the Global Asset Allocation (GAA) group at Fidelity Investments. In this role, he serves as lead or co-manager for a number of multi-asset class mutual funds and subadvisory accounts for U.S. and Canadian investors. In Canada, his portfolio management responsibilities include Fidelity Monthly Income and Dividend Funds, along with Fidelity Canadian Asset Allocation Fund, Fidelity Managed Portfolios, Fidelity Canadian Balanced Fund, Fidelity Income Allocation Fund, Fidelity Asset Allocation Private Pools, Fidelity American Balanced Fund, Fidelity Tactical Strategies Fund, Fidelity Tactical Global Dividend ETF Fund, Fidelity Global Monthly High Income ETF, Fidelity Canadian Monthly High Income ETF and Fidelity Inflation-Focused Fund. In this capacity, Geoff focuses primarily on active asset allocation.

Geoff earned a BA in economics from Yale and an MBA from Stanford University. He is also a Chartered Financial Analyst (CFA) charterholder.

David Wolf

David Wolf is a portfolio manager in the Global Asset Allocation (GAA) group at Fidelity Investments. In this role, he serves as portfolio co-manager for a number of multi-asset class strategies for Canadian investors. His portfolio management responsibilities include Fidelity Monthly Income Fund and Fidelity Dividend Fund, along with Fidelity Canadian Asset Allocation Fund, Fidelity Conservative Income Fund, Fidelity Managed Portfolios, Fidelity Canadian Balanced Fund, Fidelity Income Allocation Fund, Fidelity American Balanced Fund, Fidelity Tactical Strategies Fund, Fidelity Tactical Global Dividend ETF Fund, Fidelity Global Monthly High Income ETF, Fidelity Canadian Monthly High Income ETF and Fidelity Inflation-Focused Fund. In this capacity, David focuses primarily on active asset allocation.

David earned a BA in economics from Princeton University, where he graduated magna cum laude and Phi Beta Kappa.

David Tulk

David Tulk is a portfolio manager in the Global Asset Allocation (GAA) group at Fidelity Investments. He co-manages Fidelity Balanced Managed Risk Portfolio, Fidelity Conservative Income Fund, Fidelity Conservative Income Private Pool, Fidelity Conservative Managed Risk Portfolio, Fidelity Global Monthly High Income ETF, Fidelity Canadian Monthly High Income ETF, Fidelity Tactical Strategies Fund and Fidelity Inflation-Focused Fund. He is also a principal liaison for portfolio management to a broad range of current and prospective clients and internal partners, providing detailed portfolio reviews and serving as a key conduit of client objectives, requirements and marketplace insight back to the investment team.

David holds a master's degree in economics from Queen's University and an honours BSc in economics (quantitative methods) from the University of Toronto. David is a Chartered Financial Analyst (CFA) charterholder.

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 \$190 billion in assets under management (as at May 17, 2022) and they include individuals, financial advisors, pension plans, endowments, foundations and more.

We are proud to provide investors a full range of domestic, international and global equity and income-oriented mutual funds, ETFs, asset allocation strategies, managed portfolios, sustainable investing products, alternative mutual funds and a high net worth program. Fidelity is available through a number of advice-based distribution channels including financial planners, investment dealers, banks and insurance companies.

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. 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.

For more information, please contact:

Chris Pepper,
Vice-President, Corporate Affairs
Fidelity Investments Canada ULC
T: (416) 307-5388
M: (416) 795-7762
E: chris.pepper@fidelity.ca

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