



Fidelity Investments Canada ULC Launches New Fidelity Global Growth Private Pool

New 85/15 Pool now available, along with enhanced fee rebate tiers

April 4, 2023, Toronto – Fidelity Investments Canada ULC (“Fidelity”) launched Fidelity Global Growth Private Pool (“the Pool”), adding to Fidelity’s [Private Investment Program](#) product lineup.

Through the Fidelity Private Investment Program, high net worth investors can gain access to pools that utilize Fidelity’s proprietary research methods and investment strategies with an institutional-style investment management approach, focused on risk management. This program is designed around carefully selected and constructed pools, which aim to achieve specific objectives, while leveraging Fidelity’s strong global capabilities to create solutions that can help investors achieve their financial goals. Fidelity Private Investment Pools also offer tax-efficient options.

The Pool aims to achieve high total investment return and is geared towards capital growth. It invests primarily in underlying funds, which generally invest, either directly or indirectly through other underlying funds, in global equity securities and/or fixed income securities. The Pool follows a neutral mix guideline of approximately 85% equity, and 15% fixed income and money market instruments.

Fidelity is also enhancing the fee rebate pricing tiers associated with the Fidelity Private Investment Program. Investors can obtain pricing benefits that grow progressively, meaning higher tiers have larger fee rebates. More information about the rebates can be found in the Pools’ simplified prospectuses and amendment documents.

“At Fidelity, we’re focused on creating a dynamic product lineup that offers targeted solutions to investors at every stage of their financial journey,” said Kelly Creelman, Senior Vice President, Products and Marketing, Fidelity. “Investors looking for growth options beyond the traditional 60/40 may want to consider adding Fidelity Global Growth Private Pool to their portfolio.”

The Pool is managed by Fidelity Investments’ Global Asset Allocation (GAA) team portfolio managers [David Wolf](#) and [David Tulk](#). The GAA team oversees asset allocation for a variety of Fidelity funds, including the Fidelity Managed Portfolios, Fidelity Monthly Income Funds and the balanced Private Pools, among others.

Key investor benefits:

- **Diversified exposure** to equities and fixed income, with access to a wide range of underlying funds managed by Fidelity Investments’ portfolio managers focusing on different geographies and investment styles.
- **Tactical asset allocation** employed across multiple dimensions of the portfolio to take advantage of market opportunities and manage risk.
- **Combined strength** of Fidelity Investments’ Global Asset Allocation team and worldwide resources in a single solution, like Fidelity’s other multi-asset class strategies.

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

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 \$196 billion in assets under management (as at March 28, 2023) 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 Funds are 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.

As at April 4, 2023, investors in Fidelity Private Investment Program may qualify for reduced pricing through combined management and administration fee rebates (class) or distributions (trust) before sales tax ("fee rebates"). For the Pools, the amount of the fee reduction is based on the amount invested in each Pool and begins on the first dollar over \$250,000 invested. Fee reductions apply only on that portion of assets that fall within the specified tier. For example, if an investor holds \$1 million in Series B securities of an equity Pool, then the reductions apply as follows: zero for the first \$250,000 in assets; 5 basis points on that portion of assets above \$250,000 and below \$500,000; 10 basis points on that portion of assets greater than \$500,000 up to \$1 million. Please reference the Pools' Prospectus for Private Investment Program financial grouping rules.

"Fidelity Investments" and/or "Fidelity" refers collectively to: i) FMR LLC, a U.S. company, and certain subsidiaries, including Fidelity Management & Research Company LLC ("FMR") and Fidelity Management & Research (Canada) ULC ("FMR-Canada") – which carries on business in British Columbia as FMR Investments Canada ULC; and ii) Fidelity Investments Canada ULC ("FIC") and its affiliates. FMR-Canada commenced business in Ontario on February 1, 2018. FMR-Canada is registered as a portfolio manager with the Ontario Securities Commission and as a portfolio manager with the other Canadian securities commissions. The scope of FMR-Canada's business is currently limited to offering the GAA strategies through a discrete portfolio management team at FMR-Canada. The GAA strategies are offered by FMR-Canada on a sub-advised basis to accounts advised by FIC, with FMR-Canada acting as either direct sub-adviser to FIC or as sub-sub-adviser through non-Canadian Fidelity advisers, including (and principally) U.S. SEC-registered investment advisers, such as FMR. FMR-Canada does not offer these strategies directly to investors in Canada. FMR-Canada has also registered "Fidelity Investments" as a trade name in Canada.

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