Fidelity Investments Canada Launches Fidelity Global Equity+ Fund

Access seasoned underlying portfolio managers Mark Schmehl, Hugo Lavallée and Dan Dupont in one investment solution

TORONTO, October 3, 2023 - Fidelity Investments Canada ULC (Fidelity) today launched Fidelity Global Equity+ Fund (the Fund). This one-ticket global equity solution provides access to distinct but complementary investment styles to provide diversification and the potential for a more consistent investment experience. The Fund also offers exposure to a liquid alternative mutual fund and holds a medium risk rating.

Financial advisors can tune in to FidelityConnects at 11:30 a.m. ET today to hear directly from the three underlying portfolio managers.

The Fund is comprised of the following underlying funds:

- **Fidelity Global Innovators® Investment Trust** – A flexible investment strategy focused on innovative and disruptive companies in today's rapidly changing world. Managed by Mark Schmehl.
- **Fidelity Greater Canada Fund** – A contrarian investment strategy that aims to identify out-of-favour stocks to achieve long-term capital growth primarily investing in Canadian equities. Managed by Hugo Lavallée.
- **Fidelity Canadian Large Cap Multi-Asset Base Fund** – A Canadian equity strategy that aims to invest in large-cap companies with a focus on mitigating volatility. Managed by Dan Dupont.
- **Fidelity Global Value Long/Short Fund** – A fundamental value-oriented alternatives strategy that uses both long and short exposures. The Fund may exhibit a low correlation to equity market returns. Managed by Dan Dupont.

"As we continue to expand our product shelf, we're meeting investor demand for a fund that offers access to experienced portfolio managers with complementary investment styles," said Kelly Creelman, Senior Vice President, Products and Marketing, Fidelity. "Fidelity Global Equity+ Fund combines the investing acumen of Mark Schmehl, Dan Dupont and Hugo Lavallée in a single fund that integrates their distinct investment styles to help weather a variety of market conditions."

Key investor benefits:

- **Combines distinct investment styles** together to help diversify risk and offer potential for above-market returns over the long-term.

- **One-ticket global equity strategy** with exposure to a liquid alternative mutual fund in a traditional mutual fund.
- **Underlying funds managed by an experienced team** of portfolio managers with long-term historical track records.

Through the funds they manage, Fidelity portfolio managers Mark Schmehl, Dan Dupont and Hugo Lavallée are collectively responsible for managing $47.5B in assets under management (as at August 31, 2023).

With decades in combined investment experience, including as analysts covering a wide range of sectors, and as portfolio managers with complementary investment philosophies, Hugo, Dan and Mark have steadily strived to earn the trust of financial advisors and investors over the years by seeking to deliver long-term performance and helping them meet their financial goals.

Portfolio Managers

Mark Schmehl

Mark Schmehl has over 20 years of industry experience and joined Fidelity in 1999. He earned a BBA from Wilfrid Laurier University, an MBA from Columbia University and is a Chartered Financial Analyst (CFA) charterholder. Currently, he manages Fidelity Canadian Growth Company Fund, Fidelity Special Situations Fund, Fidelity Global Innovators® Class and Fidelity Global Innovators® ETF.

Dan Dupont

Dan Dupont manages Fidelity Canadian Large Cap Fund, Fidelity Global Value Long/Short Fund, Fidelity Concentrated Value Private Pool and, alongside Joel Tillinghast, Sam Chamovitz, Morgen Peck and Kyle Weaver, Fidelity NorthStar® Fund. Dan earned a joint Honours BCom in economics and finance from McGill University and joined Fidelity in 2001 as a research analyst.

Hugo Lavallée

Hugo Lavallée manages Fidelity Climate Leadership Fund®, Fidelity Canadian Opportunities Fund, Fidelity Greater Canada Fund and is a co-lead manager of Fidelity Canadian Asset Allocation Fund. Hugo graduated with first-class honours from the McGill commerce program in 2002, specializing in economics and finance, and joined Fidelity the same year as a research analyst.

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 $199 billion in assets under management (as at September 27, 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 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, asset allocation services 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. Past performance may not be repeated.

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