



## Fidelity Investments Canada funds receive 16 LSEG Lipper Fund Awards for 2024

*Fidelity also recognized as winning firm in two ETF group categories*

**TORONTO, November 7, 2024** – Several mutual funds and exchange-traded funds (ETFs) managed by Fidelity Investments Canada ULC (Fidelity) were named LSEG Lipper Fund Awards Canada 2024 winners for delivering consistently strong risk-adjusted performance relative to their peers. Fidelity also won in the Mixed Assets ETF and Overall ETF group award categories.

“We are delighted to receive LSEG Lipper Fund Awards 2024 for Fidelity mutual funds and ETFs in multiple categories and timeframes,” said Kelly Creelman, Senior Vice President, Products and Marketing at Fidelity. “This recognition reflects the hard work and commitment of our portfolio managers, research team, and the many teams supporting these strategies. We deeply appreciate the trust that the advisor and investor community places in our firm, and our focus remains on helping our clients reach their financial and life goals.”

### Canada Fund Awards

Fund Name	Portfolio Manager(s)	Classification	Award Period(s)
Fidelity ClearPath® 2045 Portfolio	Andrew Dierdorf, Brett Sumsion, and Bruno Crocco	2035+ Target Date Portfolio	3 and 5 Years
Fidelity Emerging Markets Fund	Sam Polyak	Emerging Markets Equity	10 Years
Fidelity Floating Rate High Income Fund	Eric Mollenhauer, Kevin Nielsen, and Chandler Perine	Floating Rate Loan	3 Years
Fidelity Global Growth Portfolio	David Wolf and David Tulk	Global Equity Balanced	10 Years
Fidelity Global Income Portfolio	David Wolf and David Tulk	Global Fixed Income Balanced	10 Years
Fidelity North American Equity Class	Darren Lekkerkerker	North American Equity	5 Years

Fidelity Technology Innovators Fund	HyunHo Sohn	Sector Equity	5 and 10 Years
Fidelity Tactical High Income Fund	Adam Kramer, Ford O’Neil, and Ramona Persaud	Tactical Balanced	10 Years

### Canada ETF Awards

Fund Name	Portfolio Manager(s)	Classification	Award Period(s)
Fidelity All-in-One Growth ETF	Geode Capital Management	Global Equity Balanced	3 Years
Fidelity All-in-One Balanced ETF	Geode Capital Management	Global Neutral Balanced	3 Years
Fidelity U.S. Value ETF	Geode Capital Management	US Equity	3 Years
Fidelity U.S. High Quality ETF	Geode Capital Management	US Equity	5 Years

### Canada ETF Group Awards

- Mixed Assets
- Overall

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

### About LSEG and the LSEG Lipper Fund Awards

The LSEG Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers.

LSEG is one of the world’s leading providers of financial markets infrastructure and delivers financial data, analytics, news and index products to more than 40,000 customers in over 170 countries. LSEG helps organizations fund innovation, manage risk and create jobs by partnering with customers at every point in the trade lifecycle: from informing their pre-trade decisions and executing trades to raising capital, clearing and optimization. Backed by more than three centuries of experience, innovative technologies and a team of 25,000 people in over 60 countries, LSEG is driving financial stability, empowering economies and enabling you to grow sustainably.

The LSEG 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 LSEG Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is an objective, quantitative, risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the LSEG Lipper Fund Award. For more information, see [lipperfundawards.com](http://lipperfundawards.com). Although LSEG Lipper makes reasonable efforts to ensure the accuracy and reliability of the data used to calculate the awards, their accuracy is not guaranteed.

### **Fidelity ClearPath® 2045 Portfolio**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity ClearPath® 2045 Portfolio (Series F), Best 2035+ Target Date Portfolio Fund over three and five years, out of a total of 16 and 12 funds, respectively.

Performance for the fund for the period ending September 30, 2024, is as follows: 28.18% (one year), 7.77% (three years), 10.80% (five years), 9.06% (ten years) and 8.45% (since inception November 3, 2005).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 5 (three years), 5 (five years), 5 (ten years), 5 (overall).

### **Fidelity Emerging Markets Fund**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity Emerging Markets Fund (Series F), Best Emerging Markets Equity Fund over ten years, out of a total of 27 funds.

Performance for the fund for the period ending September 30, 2024, is as follows: 29.33% (one year), 3.44% (three years), 8.44% (five years), 8.50% (ten years) and 6.64% (since inception October 10, 2000).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 4 (three years), 5 (five years), 5 (ten years), 5 (overall).

### **Fidelity Floating Rate High Income Fund**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity Floating Rate High Income Fund (Series F), Best Floating Rate Loan Fund over three years, out of a total of 11 funds.

Performance for the fund for the period ending September 30, 2024, is as follows: 7.95% (one year), 8.08% (three years), 5.27% (five years), 6.08% (ten years) and 6.55% (since inception October 16, 2013).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 5 (three years), 4 (five years), 5 (ten years), 5 (overall).

### **Fidelity Global Growth Portfolio**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity Global Growth Portfolio (Series F), Best Global Equity Balanced Fund over ten years, out of a total of 107 funds.

Performance for the fund for the period ending September 30, 2024, is as follows: 29.38% (one year), 8.80% (three years), 11.06% (five years), 9.96% (ten years) and 7.74% (since inception April 18, 2007).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 5 (three years), 5 (five years), 5 (ten years), 5 (overall).

### **Fidelity Global Income Portfolio**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity Global Income Portfolio (Series F), Best Global Fixed Income Balanced Fund over ten years, out of a total of 55 funds.

Performance for the fund for the period ending September 30, 2024, is as follows: 18.94% (one year), 4.83% (three years), 5.64% (five years), 5.89% (ten years) and 5.52% (since inception April 18, 2007).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 5 (three years), 5 (five years), 5 (ten years), 5 (overall).

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

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity North American Equity Class (Series F), Best North American Equity Fund over five years, out of a total of 18 funds.

Performance for the fund for the period ending September 30, 2024, is as follows: 34.69% (one year), 12.12% (three years), 15.95% (five years) and 13.02% (since inception October 28, 2015).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 5 (three years), 5 (five years), 5 (overall).

### **Fidelity Technology Innovators Fund**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity Technology Innovators Fund (Series F), Best Sector Equity Fund over five and ten years, out of a total of 19 and 13 funds, respectively.

Performance for the fund for the period ending September 30, 2024, is as follows: 37.04% (one year), 14.00% (three years), 21.94% (five years), 22.28% (ten years) and 7.41% (since inception October 10, 2000).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 5 (three years), 5 (five years), 5 (ten years), 5 (overall).

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

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity Tactical High Income Fund (Series F), Best Tactical Balanced Fund over ten years, out of a total of 31 funds.

Performance for the fund for the period ending September 30, 2024, is as follows: 17.61% (one year), 6.05% (three years), 9.47% (five years), 9.40% (ten years) and 9.37% (since inception May 28, 2014).

The corresponding LSEG Lipper Leader ratings of the fund for the same period are as follows: 4 (three years), 5 (five years), 5 (ten years), 5 (overall).

### **Fidelity All-in-One Growth ETF**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity All-in-One Growth ETF, Best Global Equity Balanced ETF over three years, out of a total of 11 ETFs.

Performance for the ETF for the period ending September 30, 2024, is as follows: 30.88% (one year), 11.17% (three years) and 11.35% (since inception January 21, 2021).

The corresponding LSEG Lipper Leader ratings of the ETF for the same period are as follows: 5 (three years), 5 (overall).

### **Fidelity All-in-One Balanced ETF**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity All-in-One Balanced ETF, Best Global Neutral Balanced ETF over three years, out of a total of 18 ETFs.

Performance for the ETF for the period ending September 30, 2024, is as follows: 25.69% (one year), 8.00% (three years) and 7.92% (since inception January 21, 2021).

The corresponding LSEG Lipper Leader ratings of the ETF for the same period are as follows: 5 (three years), 5 (overall).

### **Fidelity U.S. Value ETF**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity U.S. Value ETF, Best U.S. Equity ETF over three years, out of a total of 57 ETFs.

Performance for the ETF for the period ending September 30, 2024, is as follows: 31.61% (one year), 18.98% (three years) and 21.20% (since inception June 5, 2020).

The corresponding LSEG Lipper Leader ratings of the ETF for the same period are as follows: 5 (three years), 5 (overall).

### **Fidelity U.S. High Quality ETF**

LSEG Lipper Fund Awards Canada 2024 Winner, Fidelity U.S. High Quality ETF, Best U.S. Equity ETF over five years, out of a total of 32 ETFs.

Performance for the ETF for the period ending September 30, 2024, is as follows: 31.76% (one year), 14.98% (three years), 16.89% (five years) and 17.62% (since inception January 18, 2019).

The corresponding LSEG Lipper Leader ratings of the ETF for the same period are as follows: 5 (three years), 5 (five years), 5 (overall).

### **Mixed Assets – ETF Group Award**

LSEG Lipper Fund Awards Winner Canada 2024, Best Mixed Asset Fund Family Group over three years.

### **Overall – ETF Group Award**

LSEG Lipper Fund Awards Winner Canada 2024, Best Overall Fund Family Group over three years.

## 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 \$269 billion (as at October 23, 2024), 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.

Commissions, trailing commissions, management fees, brokerage fees and expenses may be associated with investments in mutual funds and ETFs. Please read the mutual fund's 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.

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