**Client calls surge on geopolitical jitters, advisors lean into coaching and targeted portfolio tweaks**

***FidelityConnects Advisor Pulse Polls**: 58% report higher call volumes; brokers more likely to adjust portfolios while planners emphasize staying the course*

**TORONTO, March 18, 2026** – With markets whipsawed by fastmoving geopolitical headlines, Canadian financial advisors are picking up the pace and the playbook. New findings from Fidelity Investments Canada ULC ("Fidelity") show **58% of advisors report increased client call volumes, with clients valuing the following services the most**:

- **Coaching** – keeping grounded in the plan **(36%)**
- **Confidence** – revisiting goals and staying on track **(30%)**
- **Clarity** – breaking down market moves **(25%)**

The results were captured live during an Extended Fidelity*Connects* program, *Geopolitics and Growth: Positioning Portfolios for a World in Motion*, which drew more than 2,100 advisors from across Canada. A replay of segments from Fidelity portfolio manager Joe Overdevest and equity research analyst Jin Hwang as well as portfolio manager Patrice Quirion are available online.

While the client demand for advisor guidance is widespread, the data shows how advisors deliver that support can vary by business model. Planners are more focused on coaching and staying the course, while brokers tend to prioritize targeted portfolio adjustments – both playing an essential role in delivering comprehensive financial advice.

*CHART: What clients value most during periods of geopolitical volatility, by advisor type (Planner vs. Broker)*

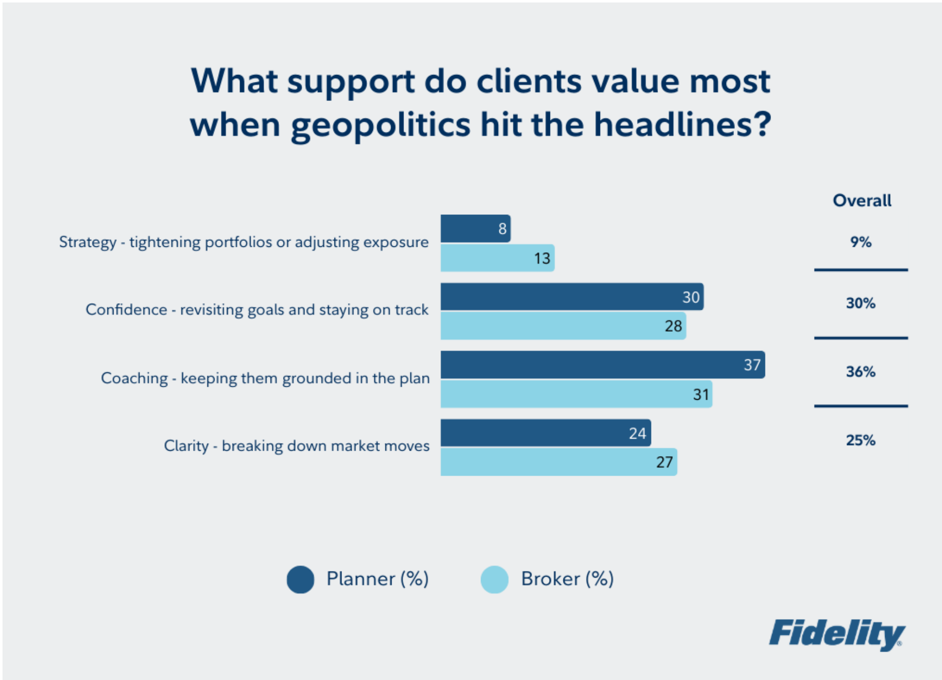
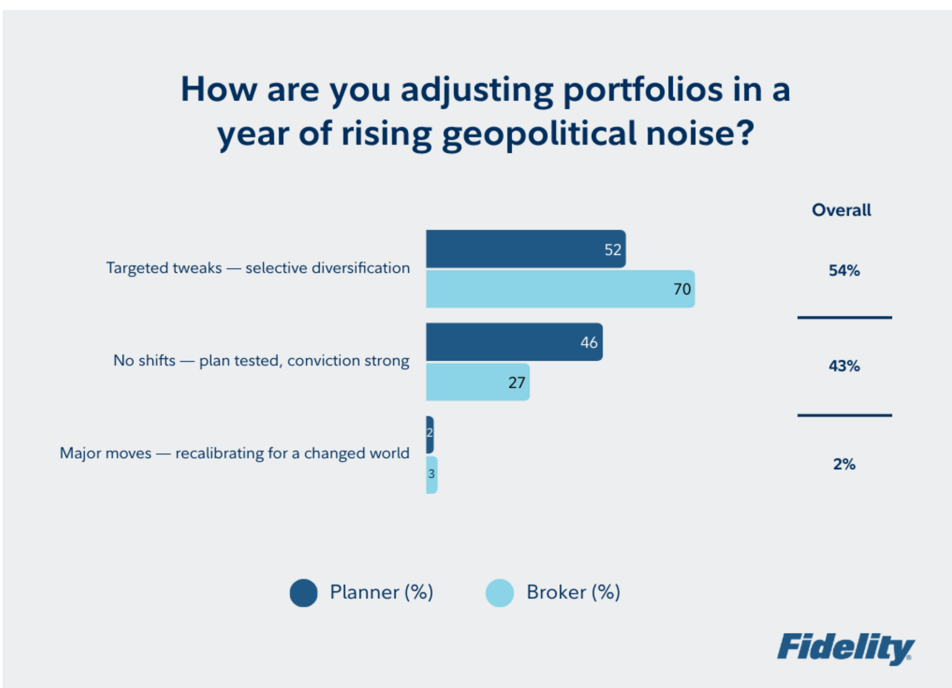
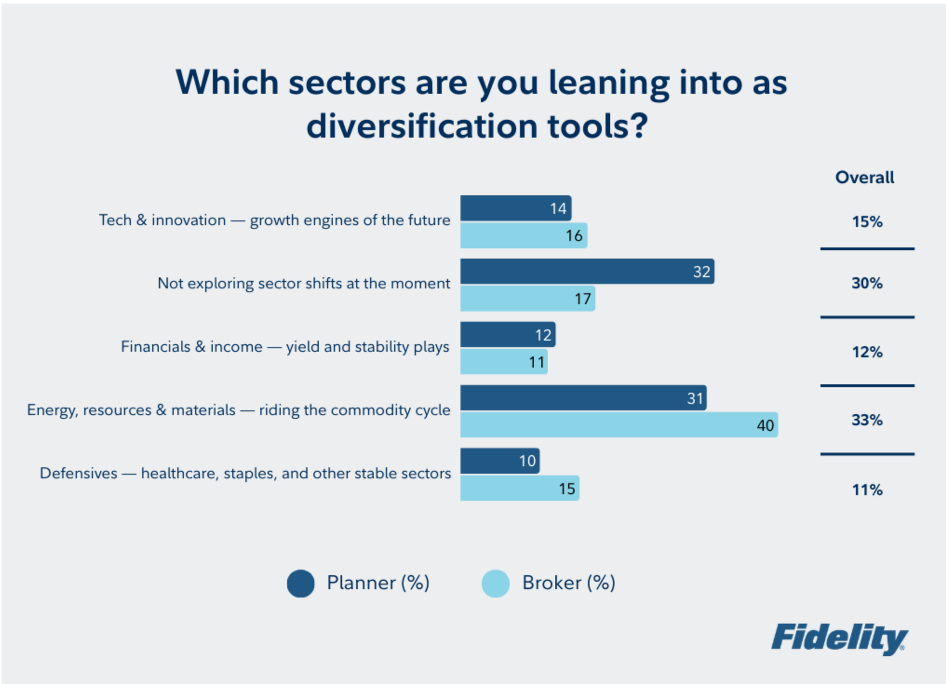



*CHART: How advisors are adjusting portfolios amid rising geopolitical uncertainty, by advisor type (Planner vs. Broker)*



Overall, **54% of advisors say they're making targeted tweaks to portfolios**, emphasizing diversification, while 43% report no changes to well-tested client plans. Where adjustments are being made, brokers are more likely to lean toward energy, resources and defensive sectors.

*CHART: Sector preferences for diversification differ by advisor type (Planner vs. Broker)*




Across the full advisor sample, **Energy, Resources and Materials ranked as the top sector for diversification (33**%). A further 30% of advisors said they're not exploring sector shifts at the moment (30%), followed by technology & innovation (15%), financials & income (12%) and defensives (11%).

Advisors are also turning to familiar assets to help manage uncertainty. With gold in focus, **57% of advisors say precious metals are being used primarily as a diversifier.** Others are using them as a hedge (26%) or as a short-term tactical trade (17%).

Taken together, the findings show a disciplined response to uncertainty – combining reassurance, clarity and selective portfolio action.

"Having partnered with financial advisors for nearly 40 years in Canada, we know that when uncertainty spikes, professional advice shines" said Chris Pepper, Vice President, Corporate Affairs, Fidelity. "What we're seeing is advisors leaning into that role in different but complementary ways – helping clients stay grounded, cutting through the noise and making thoughtful portfolio adjustments when appropriate"

**About the FidelityConnects Advisor Pulse Polls**
Fidelity*Connects* Advisor Pulse Polls capture real-time sentiment from one of Canada's most engaged advisor communities, tracking perspectives on markets, geopolitics, technology, regulation and the business of advice. Poll sample sizes for this release ranged from **790 to 1,100** advisors.

**About FidelityConnects**
For the fifth consecutive year, FidelityConnects was ranked the #1 webcast and podcast by Canadian financial advisors, according to the 2025 Environics Advisor Digital Experience Study. Episodes are available on Spotify, Apple Podcasts, YouTube and other major platforms.

Listen/Subscribe: **Spotify** | **Apple Podcasts** | **YouTube**

**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 $364 billion (as at March 11, 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.

**For more information, please contact:**

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

Catherine Fiorino
Communications Manager
E: catherine.fiorino@fidelity.ca

Find us on social media @FidelityCanada

https://www.fidelity.ca
Listen to FidelityConnects on Apple or Spotify

3970550-v2026313