



Fidelity's research: A competitive advantage

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What sets us apart?

1




People

2



Process

3



Scale

Evolution of Makoko Discovery, 2017–2018

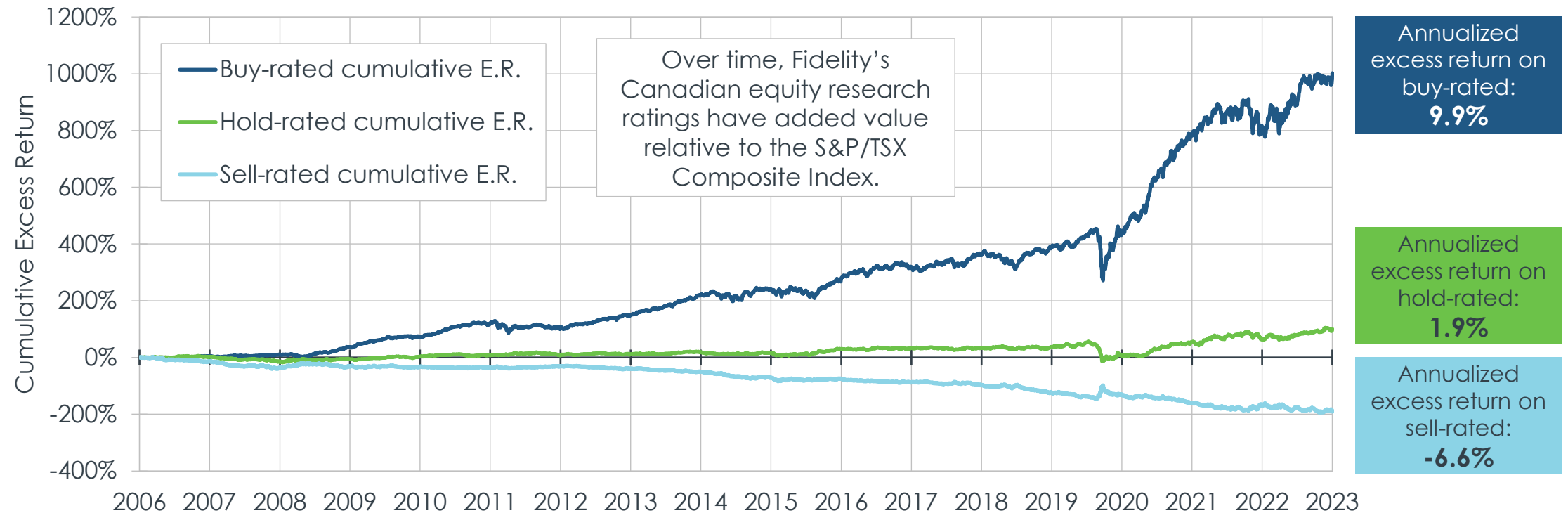


Source: Fidelity Investments Canada ULC and Planet.com.

Fidelity Canadian equity research ratings

Performance relative to S&P/TSX Composite Index, as at June 30, 2023

Fidelity Investments Canada ULC Canadian equity research ratings performance relative to the S&P/TSX composite index



Source: Fidelity Investments Canada ULC. Based on Fidelity Canada Investment Management research, as at June 30, 2023. "Buy-rated," "Hold-rated" and "sell-rated" represent all actively rated securities at any given time, equally weighted in each of their respective categories. Daily data represented from June 30, 2006, to September 30, 2022. The results of the equally weighted research rating baskets should not be taken as indicative of or directly compared to the results of any particular Fidelity Fund. Each fund follows a specific investment objective and employs portfolio construction techniques to mitigate risk or deliver specific risk and return attributes, none of which are considered in the construction of the ratings baskets. Portfolio managers may follow the research ratings and consider them in selecting stock for the portfolios they manage but are not required to do so, and may take different views on the risk/return potential of individual stocks or consider different time horizons from the analyst responsible for rating that stock. Each portfolio manager is responsible for and exercises full discretion in the selection of stocks for the portfolios they manage. The results presented are based on past performance and should not be taken as indicative of future potential performance.

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*Carrying on business in British Columbia as FMR Investments Canada ULC.

Source: FMR, FIAM, FIL Limited, FIC, FMR-Canada and Geode as at March 31, 2023. Data are unaudited. Figures for investment professionals do not include Division Management and Other Investment.

Investment professional
count of subadvisors



55 | FOUNDED IN
1987



403 | FOUNDED IN
1969



698 | FOUNDED IN
1946



32 | FOUNDED IN
2001

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