



PRESS RELEASE

## Desjardins awarded by Fundata for six FundGrade A+® Awards 2022

**Montreal, January 27, 2023** – Desjardins received six trophies at the annual Fundata Canada Inc. [FundGrade A+® Awards](#) ceremony, held last night. The six FundGrade A+® Awards won by Desjardins break down as follows: two SocieTerra mutual funds and four guaranteed investment funds. All these funds were rewarded for their sustained performance during 2022. The FundGrade A+® Awards celebrate Canadian funds that displayed the best risk-adjusted returns and maintained high FundGrade scores throughout an entire calendar year.

"We're very honoured and proud that our mutual funds and guaranteed investment funds are recognized by Fundata. Our products demonstrate Desjardins' commitment to providing our members and clients with performance-oriented investment solutions that meet their needs and objectives," said Jean-François Girard, Director, Mutual Fund and Guaranteed Investment Development at Desjardins.

The following [mutual funds](#) offered by Desjardins Investments Inc. were awarded Fundata's FundGrade A+® rating:

Fund Name	CIFSC Category*	FundGrade Start Date**	Fund Count
<a href="#">Desjardins SocieTerra American Equity Fund</a>	U.S. Equity	1/31/2017	836
<a href="#">Desjardins SocieTerra Cleantech Fund</a>	Global Small/Mid Cap Equity	1/31/2017	127

The following [guaranteed investment funds](#) (GIFs) offered by Desjardins Financial Security, Life Insurance Company were awarded Fundata's FundGrade A+® rating:

Fund Name	CIFSC Category*	FundGrade Start Date**	Fund Count
<a href="#">DFS GIF - Canadian Balanced - Fiera Capital</a>	Canadian Equity Balanced	1/31/2013	563
<a href="#">DFS GIF - International Equity - MFS</a>	International Equity	1/31/2013	312
<a href="#">DFS GIF – International Equity Growth – Desjardins</a>	International Equity	1/31/2013	312
<a href="#">DFS GIF – Maximum Growth</a>	Global Equity Balanced	1/31/2015	846

\* The Canadian Investment Funds Standards Committee (CIFSC) is a Canadian independent organization that defines the categories of funds.

\*\* The end date for the FundGrade calculation is December 31, 2022 for the period from January 1, 2022 to December 31, 2022.

## **About Desjardins Group**

[Desjardins Group](#) is the largest cooperative financial group in North America and the fifth largest cooperative financial group in the world, with assets of \$408 billion as at September 30, 2022. It was named one of Canada's Top 100 Employers in 2022 by Mediacorp. To meet the diverse needs of its members and clients, Desjardins offers a full range of products and services to individuals and businesses through its extensive distribution network, online platforms and subsidiaries across Canada. Ranked among the world's strongest banks according to *The Banker* magazine, Desjardins has one of the highest capital ratios and [credit ratings](#) in the industry.

### **For journalists only:**

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FundGrade A+® is used with permission from Fundata Canada Inc., all rights reserved. The FundGrade A+® Awards are presented annually by Fundata Canada Inc. to Canadian investment funds that achieve consistently high FundGrade scores through an entire calendar year. The FundGrade A+® calculation is supplemental to the monthly FundGrade ratings and is calculated at the end of each calendar year. The FundGrade rating system evaluates funds based on their risk-adjusted performance, measured by Sharpe Ratio, Sortino Ratio and Information Ratio. The score for each ratio is calculated individually, covering all time periods from 2 to 10 years. The scores are then equally weighted in calculating a monthly FundGrade rating. The FundGrade ratings are divided between five tranches from "A Grade" (superior performance) to "E Grade" (lower performance). The top 10% of funds earn an A Grade; the next 20% of funds earn a B Grade; the next 40% of funds earn a C Grade; the next 20% of funds receive a D Grade; and the lowest 10% of funds receive an E Grade. To be eligible, a fund must have received a FundGrade rating every month in the previous year. The FundGrade A+® uses a GPA (Grade Point Average)-style calculation, where each monthly FundGrade rating from "A" to "E" receives a score from 4 to 0, respectively. A fund's average score for the year determines its GPA. Any fund with a GPA of 3.5 or greater is awarded a FundGrade A+® Award. The FundGrade grades are subject to change each month. For more information, please see the web site [www.FundGradeAwards.com](http://www.FundGradeAwards.com). Although Fundata makes every effort to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Fundata.

The Desjardins SocieTerra American Equity Fund (A-Class Units) received the A+ Grade in the U.S. Equity category, out of a total of 836 funds competing in this category as defined by the Canadian Investment Funds Standards Committee (CIFSC), a Canadian independent organisation from Fundata. The Desjardins SocieTerra Cleantech Fund (A-Class Units) received the A+ Grade in the Global Small/Cap Equity category, out of a total of 127 funds competing in this category as defined by the CIFSC. This grade is attributed for the period from January 1, 2022 to December 31, 2022.

The Desjardins Funds are not guaranteed, their value fluctuates frequently, and their past performance is not indicative of their future returns. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns, including changes in unit value and reinvestment of all distributions and do not consider sales, redemption, distribution or other optional charges, or income taxes payable by any security holder, that would have reduced returns. The Desjardins Funds are offered by registered dealers.

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