

Newsroom

Desjardins Quebec Balanced Fund wins Lipper Fund Award – November 30, 2016

At this year's Lipper Fund Awardsⁱ ceremony, held in Toronto on November 9, 2016, the [Desjardins Quebec Balanced Fund](#) was recognized as the best Canadian Neutral Balanced Fund over 10 years, in a category of 58 funds.

In addition to the Lipper Award, the fund has received a number of other awards and honours, including the prestigious FundGrade A+ⁱⁱ award in 2011, 2014 and 2015.

For Sébastien Vallée, Director, Investment Solutions Development and Management, this recognition shows that Desjardins is capable of developing leading-edge, long-term investment solutions for its investors. He attributes the win to the disciplined management process used by the fund's portfolio manager, Desjardins Global Asset Management (DGAM).

DGAM, a Montreal-based investment firm belonging to Desjardins Group, employs 30 or so investment professionals and manages over C\$84 billionⁱⁱⁱ in assets. Since 2013, DGAM has relied on a systematic approach to manage the Desjardins Quebec Balanced Fund, investing in securities of Quebec-based companies.

The Lipper Fund Awards take place in 23 countries around the world to recognize investment funds that excel in providing consistently strong risk-adjusted performance relative to their peers. Lipper uses an exclusive fund evaluation method to determine the award winners.

This award, which is highly regarded in Canada's investment fund industry, shows the quality of our fund lineup once again.

ⁱ The Desjardins Quebec Balanced Fund (Class A) won the Lipper Fund Award in the Canadian Neutral Balanced category for the 10-year period ended July 31, 2016, out of a total of 58 funds competing in this category. The annual Lipper Fund Awards are part of the Thomson Reuters Awards for Excellence awarded by Lipper, Inc. and highlight funds that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The Lipper Fund Awards are based on the Lipper Ratings for Consistent Return, which is a risk-adjusted performance measure calculated over 36-, 60- and 120-month periods. The highest 20% of funds in each category are named Lipper Leaders for Consistent Return and receive a score of 5; the next 20% receive a score of 4; the middle 20% are scored 3; the next 20% are scored 2; and the lowest 20% are scored 1. The highest Lipper Leader for Consistent Return in each category wins the Lipper Fund Award. Lipper Leader ratings change monthly. For more information, see www.lipperfundawards.com. Although Lipper makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Lipper. The returns posted by the Desjardins Quebec Balanced Fund (Class A) for the period ended October 31, 2016 are as follows: 7.83% (1 year), 8.84% (3 years), 9.00% (5 years), 6.76% (10 years) and 7.20% (since its inception on June 20, 1997). The corresponding Lipper Leader ratings of the fund for the same period are as follows: N/A (1 year), 5 (3 years), 5 (5 years) and 5 (10 years). 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 take into account sales, redemption, distribution, or optional charges or income taxes payable by any security holder that would have reduced returns. Investment funds are not guaranteed, their values change frequently and past performance may not be repeated. Desjardins Funds are offered by registered dealers such as Desjardins Financial Services Firm Inc., a mutual fund dealer belonging to Desjardins Group that distributes the funds in caisses throughout Quebec and Ontario, as well as through Desjardins Financial Centre.

ⁱⁱ The objective of FundGrade's rating system is to identify high-quality mutual funds in the Canadian mutual fund universe that have achieved superior risk-adjusted performance relative to their peers in their category during a single period. The A+ grade was designed to identify not only the best performing mutual funds but also the most consistent. It is a supplemental calculation to the FundGrade, looking at the FundGrades from the previous calendar year. To achieve an A+, a mutual fund must have achieved and maintained high FundGrade scores throughout the year. For more information about FundGrade A+, visit the website at www.fundgradeawards.com. Source: Fundata.

ⁱⁱⁱ As at September 30, 2016