

Desjardins Sustainable Portfolios

Quarterly Report 2025-03-31

Market Overview

Market Returns as of 2025-03-31 (%)



	3 months	6 months	1 year	3 years	5 years	10 years
Fixed Income						
FTSE Canada Universe Bond Index	2,02	1,98	7,65	2,50	0,88	1,77
Bloomberg Barclays Multiverse (CAD Hedged)	0,80	- 0,46	3,53	0,89	0,17	1,63
Equities						
MSCI Canada Index (total return)	1,38	6,15	16,59	8,71	16,99	8,61
MSCI USA Index (CAD) (total return)	- 4,44	4,57	15,05	14,12	18,85	13,85
MSCI EAFE Index (CAD) (total return)	7,08	4,81	12,11	11,75	12,56	7,27
MSCI Emerging Markets Index (CAD) (total return)	3,08	1,14	15,55	6,84	8,62	5,45
MSCI ACWI ex/Canada (CAD) (total return)	- 1,51	3,68	13,48	12,11	15,76	10,56

Sources : Desjardins Investments inc., Morningstar inc.

Equity Market Overview

Contributors/Detractors (sector contributions % to total return)

Regions	Contributors		Detractors	
	Sector	Contribution	Sector	Contribution
Canada	Basic Materials	2,1	Technology	-0,7
	Energy	0,6	Financial Services	-0,4
	Utilities	0,3	Industrials	-0,2
United States	Healthcare	0,6	Technology	-4,0
	Financial Services	0,3	Consumer Cyclical	-1,5
	Energy	0,3	Communication Services	-0,6
Emerging Markets	Consumer Cyclical	1,7	Technology	-2,1
	Financial Services	1,4	Real Estate	0,0
	Communication Services	1,1	Industrials	0,0
Europe Australasia Far East (EAFE)	Financial Services	3,2	Technology	-0,2
	Industrials	1,2	Consumer Cyclical	0,0
	Consumer Defensive	0,6	Real Estate	0,0

Fixed Income Market Overview

Contributors/Detractors (total return)

FTSE Canada	2,02	Bloomberg Multiverse	0,8
Canada Government	2,09	USA Universe	2,7
Canada Corporate	1,81	Global Universe	2,7
		High Yield Universe	1,9
		Canada Universe	1,9

Portfolio Performance (Class A) as of 2025-03-31 (%)

	3 months	1 year	3 years	5 years	10 years	Since Inception	Inception Date
Desjardins Sustainable Conservative	0,59	5,63	1,71	2,43	1,84	3,66	2009-01-20
Desjardins Sustainable Moderate	0,36	5,88	2,10	0,00	0,00	2,66	2020-04-14
Desjardins Sustainable Balanced	- 0,05	0,55	6,23	2,71	5,00	3,26	2009-01-20
Desjardins Sustainable Growth	- 0,21	6,53	3,11	6,08	3,90	4,32	2000-01-10
Desjardins Sustainable Maximum Growth	- 0,81	6,89	3,89	8,18	5,15	7,28	2009-01-20
Desjardins Sustainable 100% Equity	- 1,18	7,56	4,77	10,31	0,00	7,44	2019-07-08

Unlike the benchmark, the portfolio's performance is net of fees and expenses

* In compliance with current legislation fund performance information cannot be published for funds with history of less than one year.

Sources : Desjardins Investments inc., Morningstar inc.

Performance Overview

Contributors and Detractors

Performance Attribution	Contributors		Detractors	
	Name	Contribution	Name	Contribution
Regions	Europe	0,4%	North America	-0,8%
	Asia Pacific	0,1%	Far East	-0,1%
	Latin America	0,1%	Unclassified	0,0%
Sectors	Materials	0,8%	Information Technology	-2,3%
	Health Care	0,5%	Industriels	-0,1%
	Consumer Staples	0,4%	Consumer Discretionary	-0,1%
	Financials	0,4%	Communication Services	-0,1%
Securities	Agnico Eagle Mines Ltd	0,5%	Microsoft Corp	-0,3%
	Wheaton Precious Metals Corp	0,4%	Broadcom Inc	-0,3%
	The Toronto-Dominion Bank	0,2%	NVI DIA Corp	-0,2%
	\Neste Connections Inc	0,1%	Alphabet Inc Class A	-0,2%
	CVS Health Corp	0,1%	Apple Inc	-0,2%
	Visa Inc Class A	0,1%	Amazon.com Inc	-0,1%
	Intact Financial Corp	0,1%	Accenture PLC Class A	-0,1%
	Essilorluxottica	0,1%	Service Now Inc	-0,1%
	Republic Services Inc	0,1%	Brookfield Corp Registered Shs -A- Limite	-0,1%
	American Water Works Co Inc	0,1%	Taiwan Semiconductor Manufacturing Co	-0,1%
Style and Market Cap	Large Value	0,7%	Small Value	-0,3%
	Mid Value	0,1%	Large Blend	-0,2%
	Unclassified	0,0%	Large Growth	-0,2%

Values shown above are from the Desjardins Sustainable Balanced portfolio

Portfolio Contributions to Total Return (Class A) as of 2025-03-31 (%)

Contributors

Portfolios	Underlying Assets	Weight	Return	Contribution
Desjardins Sustainable Conservative	Desjardins Sustainable Canadian Bond I	37,7%	2,0%	0,7%
	Desjardins Sustainable Canadian Corp BdI	8,5%	1,7%	0,1%
	Desjardins Sustainable Canadian Equity A	6,8%	1,9%	0,1%
Desjardins Sustainable Moderate	Desjardins Sustainable Canadian Bond I	30,9%	2,0%	0,6%
	Desjardins Sustainable Canadian Equity A	9,2%	1,9%	0,2%
	Desjardins Low Volatility Gbl Eq I	2,4%	5,0%	0,1%
Desjardins Sustainable Balanced	Desjardins Sustainable Canadian Bond I	21,8%	2,0%	0,4%
	Desjardins Sustainable Canadian Equity A	12,7%	1,9%	0,3%
	Desjardins Low Volatility Gbl Eq I	3,4%	5,0%	0,2%
Desjardins Sustainable Growth	Desjardins Sustainable Canadian Equity A	15,0%	1,9%	0,4%
	Desjardins Sustainable Canadian Bond I	16,5%	2,0%	0,3%
	Desjardins Low Volatility Gbl Eq I	4,0%	5,0%	0,2%
Desjardins Sustainable Maximum Growth	Desjardins Sustainable Canadian Equity A	19,8%	1,9%	0,5%
	Desjardins Low Volatility Gbl Eq I	5,2%	5,0%	0,3%
	Desjardins Sustainable Canadian Bond I	6,2%	2,0%	0,1%
Desjardins Sustainable 100% Equity	Desjardins Sustainable Canadian Equity A	26,1%	1,9%	0,5%
	Desjardins Low Volatility Gbl Eq I	6,2%	5,0%	0,3%
	Desjardins Sustainable International EqA	8,5%	3,1%	0,2%

Detractors

Portfolios	Underlying Assets	Weight	Return	Contribution
Desjardins Sustainable Conservative	Desjardins Sustainable American Equity A	6,0%	-6,5%	-0,4%
	Desjardins Sustainable Cleantech I	1,4%	-4,5%	-0,1%
	Desjardins Sustainable Diversity I	1,6%	-2,0%	0,0%
Desjardins Sustainable Moderate	Desjardins Sustainable American Equity A	7,6%	-6,5%	-0,3%
	Desjardins Sustainable Cleantech I	1,8%	-4,5%	-0,1%
	Desjardins Sustainable Diversity A	2,2%	-2,6%	-0,1%
Desjardins Sustainable Balanced	Desjardins Sustainable American Equity A	11,2%	-6,5%	-0,6%
	Desjardins Sustainable Cleantech I	2,5%	-4,5%	-0,1%
	Desjardins Sustainable Global Opports I	3,1%	-2,1%	-0,1%
Desjardins Sustainable Growth	Desjardins Sustainable American Equity A	13,1%	-6,5%	-0,7%
	Desjardins Sustainable Cleantech I	3,0%	-4,5%	-0,1%
	Desjardins Sustainable Global Opports I	3,7%	-2,1%	-0,1%
Desjardins Sustainable Maximum Growth	Desjardins Sustainable American Equity A	16,7%	-6,5%	-0,9%
	Desjardins Sustainable Cleantech I	3,8%	-4,5%	-0,2%
	Desjardins Sustainable Global Opports I	4,8%	-2,1%	-0,1%
Desjardins Sustainable 100% Equity	Desjardins Sustainable American Equity A	21,7%	-6,5%	-1,4%
	Desjardins Sustainable Cleantech I	4,3%	-4,5%	-0,2%
	Desjardins Sustainable Global Opports I	5,7%	-2,1%	-0,1%

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