



PRESS RELEASE

Desjardins awarded by Fundata for a record number of 18 FundGrade A+® Trophies 2021, eight of which are part of its range of Responsible Investment Solutions

Montreal, January 26, 2022 – The year 2021 will have been an exceptional year for Desjardins with a record of 18 trophies at the annual Fundata Canada Inc. [FundGrade A+® Awards](#) ceremony, which was held today. Desjardins stood out with eight awards for its responsible investment products, namely three SocieTerra mutual funds, two low-carbon exchange traded funds (ETFs) and three guaranteed investment funds SocieTerra.

“With more than 30 investment solutions available, Desjardins presents the largest responsible investment offering in Canada,” said Frédéric Tremblay, Director, Mutual and Guaranteed Funds Development at Desjardins. These awards are a testament to Desjardins' commitment to providing investment solutions that are aiming for performance and that meet the needs and objectives of our members and clients.”

The 18 FundGrade A+® Awards won by Desjardins break down as follows: seven mutual funds, two exchange traded funds (ETFs) and nine guaranteed investment funds. All these funds were rewarded for their sustained performance during 2021. The FundGrade A+® Awards celebrate Canadian funds that displayed the best risk-adjusted returns and maintained high FundGrade scores throughout an entire calendar year.

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

Fund Name	CIFSC Category*	Fund Count	FundGrade Start Date**
Desjardins American Equity Growth Fund	U.S. Equity	833	1/31/2012
Desjardins Overseas Equity Growth Fund	International Equity	382	1/31/2012
Melodia Moderate Growth Portfolio	Global Fixed Income Balanced	415	1/31/2014
Desjardins Global Equity Growth Fund	Global Equity	1127	1/31/2016
Desjardins SocieTerra American Equity Fund	U.S. Equity	833	1/31/2017
Desjardins SocieTerra Cleantech Fund	Global Small/Mid Cap Equity	108	1/31/2017
Desjardins SocieTerra Positive Change Fund	Global Equity	1127	1/31/2019

The following [Exchange Traded Funds](#) (ETFs) offered by Desjardins Global Asset Management Inc. were awarded Fundata's FundGrade A+® rating:

Fund Name	CIFSC Category*	Fund Count	FundGrade Start Date**
Desjardins RI Canada – Low CO2 Index ETF (DRMC)	Canadian Equity	379	1/31/2019
Desjardins RI USA – Low CO2 Index ETF (DRMU)	U.S. Equity	833	1/31/2019

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*	Fund Count	FundGrade Start Date**
DFS GIF – Canadian Balanced – Fiera Capital	Canadian Equity Balanced	556	1/31/2012
DFS GIF – Canadian Equity – Fidelity True North	Canadian Equity	511	1/31/2012
DFS GIF – International Equity Growth – Desjardins	International Equity	313	1/31/2013
DFS GIF – Moderate	Canadian Fixed Income Balanced	666	1/31/2015
DFS GIF – Balanced	Canadian Neutral Balanced	952	1/31/2015
DFS GIF – Maximum Growth	Global Equity Balanced	894	1/31/2015
DFS GIF – Balanced - Desjardins SocieTerra	Canadian Neutral Balanced	952	1/31/2016
DFS GIF – Growth – Desjardins SocieTerra	Canadian Equity Balanced	556	1/31/2019
DFS GIF – Maximum Growth – Desjardins SocieTerra	Global Equity Balanced	894	1/31/2019

* 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, 2021 for the period from January 1, 2021 to December 31, 2021.

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 \$391 billion^[1]. It was ranked as one of the Canada's Top 100 Employers 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

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[1] Desjardins Group assets in Canadian dollars as of September 30, 2021

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. Although Fundata makes every effort to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Fundata.

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