

# Desjardins SocieTerra Global Balanced Fund



QUARTERLY COMMENTARY AS OF MARCH 31, 2023

PORTFOLIO MANAGER:  
**Desjardins Global Asset Management**

INCEPTION DATE:  
**April 11, 2022**

CIFSC CATEGORY\*:  
**Global Neutral Balanced**

## Contributors to relative performance

- Underlying fund selection contributed positively to relative performance. The SocieTerra Global Opportunities Fund had the most positive impact, followed by the SocieTerra Positive Change Fund and the SocieTerra Environmental Bond Fund.

## Detractors from relative performance

- Nothing to report for the period.

## Major changes to portfolio in the period

- No changes were made to the fund's allocation during the period.

\*CIFSC refers to Canadian Investment Funds Standards Committee. The CIFSC has the mandate to standardize the classification of mutual funds in Canada. <http://www.cifsc.org/>.

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