

A good curator selects only the best

'Broccoli' approach to investing

Selected investment manager of the Curate Global Quality Equity Fund, Evenlode Investment Management, believes focusing on the good stuff wins the race in the long term

Evenlode Investment Management takes a distinct approach to investing, rooted in quality investing—but what does that really mean?

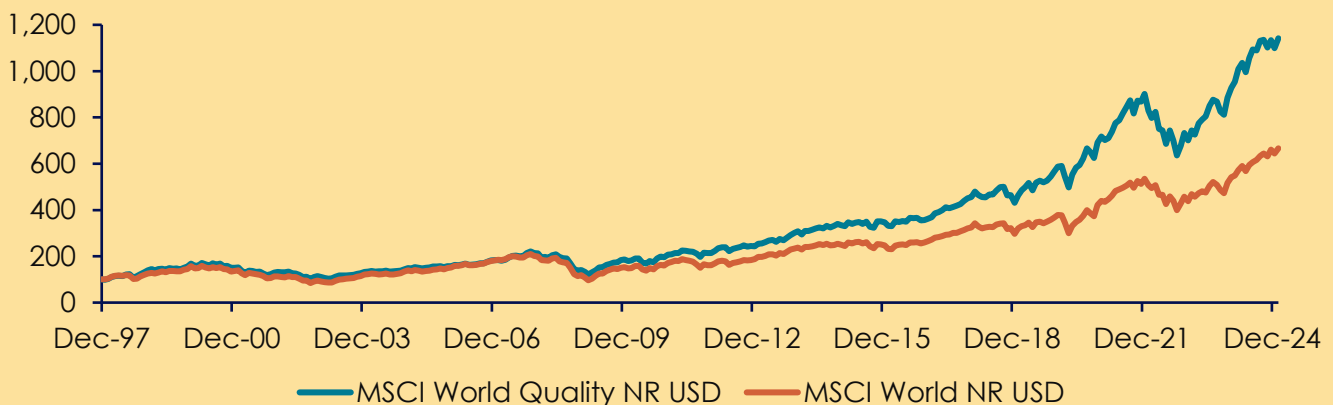
At its core, it's about identifying cash-generative, asset-light companies with strong competitive positions and, crucially, investing in them for the long term. Evenlode's investment process is designed to weather a wide range of economic conditions, aiming to construct a resilient portfolio.

For Evenlode, long-term investing isn't about quick wins—it's about steadily compounding wealth. As James Knoedler, portfolio manager of the **Curate Global Quality Equity Fund**, puts it: "We do not want to be sharpshooters. If you think about it, this is maybe a 'broccoli' approach to fund management. It's a bit of a snooze fest, but it's good for you."

What about returns?

So, has quality investing delivered what's good for you over time? The data suggests so. As shown in the chart below, over a 30-year period, the MSCI World Quality NR USD Index, which is a proxy for quality investing, outperformed the broader MSCI World NR USD Index.

Cumulative investment returns over time



Source: Morningstar to 31 January 2025

Why invest in the Curate Global Quality Equity Fund

- ✓ The quality style has been proven to contribute to outperformance over time, with lower volatility.
- ✓ If you expect global equity markets to struggle to replicate the rate of earnings in the past two years, at 23.79% and 18.67% in dollar terms in 2023 and 2024 respectively, or believe low-priced stocks reflect underlying risks, quality investing may be a more compelling choice.
- ✓ The fund could also offer diversification, as it blends well with funds following a value or growth investment style.

Overview of the Curate Global Quality Equity Fund

Client need being addressed	Fund	Underlying investment manager and unique attributes about the underlying manager	Annual management fee (excl VAT)	Why use this fund?
Global diversification	Curate Global Quality Equity Fund (\$)	 EVENLODE INVESTMENTS FOR LIFE Evenlode, an independent firm based out of West Oxfordshire, looks to identify exceptional companies with strong competitive advantages that will persist into the future. About Evenlode Investment Management	0.85% (R-class)	A concentrated global equity fund that invests in high quality, cash generative companies that are bought at sensible valuations.

If you'd like to learn more about the **Curate Global Quality Equity Fund** and how it may benefit your global portfolio, please follow these links for more information or reach out to your Curate fund specialist:

- ✓ [About the fund](#)
- ✓ [Article by Evenlode](#)
- ✓ [An introduction to Evenlode](#) (10-minute video)

For more information, visit our website or click [here](#).

Kind regards
The Curate Team

Disclosures

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