



Curate launches exclusive global funds

World-class investments with top-tier investment managers

Curate, a new global fund manager launched in August 2024, continues to expand its offering with the introduction of three global equity funds for South African investors to diversify their portfolios globally.

For the first time in South Africa, Curate is bringing investors exclusive access to managers renowned for their successful and differentiated investment strategies, namely Jennison Associates, Lyrical Asset Management, and Evenlode Investment Management.

The launch of these funds reflects Curate's mission to deliver sophisticated investment solutions by partnering with top-tier equity managers from across the globe.

"Our focus is on providing the best of global investing to our clients. This launch goes beyond just adding new funds to our offering. It's about offering carefully selected, world-class investment opportunities that resonate with the evolving needs of the South African market," says Ray Mhere, CEO of Curate.

The new funds are:

- **Curate Global Growth Equity Fund** USD, managed by Jennison Associates (Boston, USA). With a track record dating back to 1969, Jennison Associates is a global asset manager based out of Boston that seeks to identify the best growth opportunities in markets across the world. This specialist portfolio invests in innovative and market-leading companies showing exceptional growth.
- **Curate Global Value Equity Fund** USD, managed by Lyrical Asset Management (New York, USA). Founded by two long-term friends, New York-based Lyrical Asset Management is a specialist boutique firm that focuses only on one way of managing money – through carefully analysing only the cheapest 20% of shares across the world. Lyrical aims to find the Gems Amid the Junk™, by not just buying 'cheap' shares, but those that demonstrate underappreciated quality.
- **Curate Global Quality Equity Fund** USD, managed by Evenlode Investment Management (West Oxfordshire, UK). Working out of a converted barn in West Oxfordshire, Evenlode has developed a comprehensive system to identify and manage the many risks in the market, with the goal of protecting investors' money. This is a specialist portfolio of global shares, investing only in high-quality companies displaying durability of returns.



These funds are tailored to provide access to the varying investment styles of growth, value, and quality. Curate simplifies the investment process by handpicking the world's best fund managers for each of its unit trusts, offering investors a curated selection of exceptional investment opportunities.

"We believe the art of investing goes beyond just numbers. Our mission is to deliver relevant, transparent, and meaningful investment solutions to investors by partnering with the best fund managers globally. We've scoured the globe to find the best people to manage each of our unit trusts, so our investors don't need to search through hundreds of different funds to find reliable and trustworthy managers – we've done that work for them," says Ray Mhere, CEO of Curate.

"Unlike most asset managers, we do not manage any of the funds ourselves. We want specialists who offer something unique for each of our strategies, because we do not believe one manager can do everything equally well. We are confident that our managers can deliver what we and our investors are looking for. It also means that investors can feel secure that their money is in good hands."

When researching any fund manager, Curate's primary interest is always in the people who work there.

"We look for long-term partners who show professional integrity, loyalty and alignment with our manager selection criteria and expectations. Those are the kinds of people we know we can trust to look after our clients' money," says Mhere.

Curate emphasises transparency and open communication. Investors can find detailed information about each fund, the fund manager and their investment approach, on the Curate website at curate.co.za.

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