



By Ray Mhere
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Unlocking global investment opportunities with Curate Investments

In today's fast-paced and complex financial landscape, investing can feel overwhelming – especially when confronted with the staggering choice of almost 144 000 unit trust funds globally. While more options can be enticing, too many can lead to confusion instead of clarity. That's why we have dedicated ourselves to simplifying global investment choices, making it easier for you to navigate the investment world.

Our philosophy is straightforward: More isn't always better. Better is better. Curate Investments was founded to handpick the best people from all over the globe and make their expertise accessible to your clients. We go beyond merely analysing numbers; our investment manager selection process digs deep into the philosophy behind those numbers, making sure every manager we partner with shares our core values and maintains a repeatable, risk-aware investment process.

Through our extensive global partnerships, we have access to exceptional investment teams, who have consistently proven their ability to deliver impressive results. Our thorough vetting process involves not just reviewing investment return metrics, but also meeting with the managers and testing their investment conviction. This hands-on approach allows us to ensure alignment with our clients' needs and expectations.

Take, for instance, the Curate Global Sustainable Equity Fund, managed by Robeco, one of Europe's largest fund managers. This fund has consistently ranked in the top quartile of its peer group, showcasing strong returns throughout its track record. Robeco formulated how to use data to construct portfolios and enhance client returns by using various data signals (including value, quality, momentum and

sustainability) to optimise stock allocation relative to developed market index.

Similarly, the Curate Global Emerging Markets Equity Fund, also managed by Robeco, has shown historically consistent returns. Robeco aims to outperform emerging market index in dynamically growing sectors such as technology and consumer goods, ensuring exposure to areas with significant growth potential yet typically underrepresented in many South African portfolios. This strategy resonates particularly well with investors seeking diversification beyond traditional developed markets.

For the first time in South Africa, we're also bringing investors exclusive partnerships with Jennison Associates, Lyrical Asset Management and Evenlode Investments – investment managers renowned for their successful and differentiated investment strategies.

Through these managers, we have launched three global active equity funds designed to provide unique attributes to a globally diversified portfolio.

Lyrical, from the US, manages the Curate Global Value Equity Fund and is known for its innovative deep value approach. Through carefully analysing only the cheapest 20% of shares across the world, Lyrical's aim is to find the Gems Amid the Junk™.

Then there is the Curate Global Quality Equity Fund, managed by Evenlode from the UK. The fund invests in companies with high levels of profitability and competitive advantages that are hard to replicate.

Jennison, from the US, manages the Curate Global Growth

Equity Fund and invests in market-leading companies showing rapid growth, and hunts for the structural winners in terms of innovation and disruption.

We believe every investor deserves access to a world of opportunities, whether you're seeking low-cost systematic strategies, high-conviction growth investments, deep value opportunities or quality compounders. Our carefully selected funds are designed to accommodate diverse investor preferences and risk tolerances, guided by distinct investment philosophies.

Navigating the global investment landscape doesn't have to be a solo journey. Our team is here to guide you through the process, ensuring you have the knowledge and resources you need to make informed decisions. With Curate Investments, you gain a partner committed to your clients' financial success, empowering you to focus on what truly matters: helping your clients achieve their financial goals.

For more information, please connect with a Curate fund specialist or visit our website at curateinvestments.co.za.



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