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THE ART OF INVESTING

# Curate Momentum Global Growth Equity Feeder Fund

Managed by Jennison

## Fund overview

- This is a specialist portfolio of global shares that invests in innovative and market-leading companies showing exceptional growth.
- While performance may be variable over the short term, the fund aims to deliver high positive returns over periods of seven years and longer.
- The portfolio will perform best when markets are moving strongly upward.
- It provides investors with access to global markets without having to take money offshore.
- The fund can be used as part of a diversified global portfolio.

## What this fund aims to do:

- By investing in shares listed around the world, the Curate Momentum Global Growth Equity Feeder Fund seeks to grow the wealth of investors over the long term.
- Jennison's team of analysts have decades of experience  focusing on and identifying the highest growth opportunities in global markets.
- The managers also have a deep understanding of the risks that naturally come with this approach and are therefore quick to sell shares that fail to meet the high growth expectations the market has set.
- The fund can be used within a diversified global portfolio or as part of the global allocation of a broad balanced portfolio.

'If you have engineered your process to always look for major disruption, you aren't going to miss it. That's been true for this fund, whether you go back to the development of the internet, the mobile internet, cloud-based computing or generative AI. Every major shift globally in the last 15 years, we've caught.'

**– Mark Baribeau, Portfolio Manager**

## How this fund invests:

This fund invests only in innovative, market-leading companies with significant competitive advantages in industries with high growth potential.

This approach, known as growth investing, has been proven to contribute to investment performance over time as these businesses tend to outperform market expectations.

Jennison is also very deliberate about scrutinising management teams and only investing in companies led by people who have shown exceptional foresight, outstanding capital allocation, and strong corporate governance.

Led by portfolio managers Mark Baribeau, Rebecca Irwin and Tom Davis, the team is focused on identifying significant industry disruptors and investing in them early to capture their rapid growth.

**Disclaimer**: This document is not an offer to purchase any specific investment fund and should not to be construed as financial advice from Curate. Investors are encouraged to obtain independent professional investment advice before making investment decisions. The terms and conditions, frequently asked questions as well as the minimum disclosure document (MDD) and quarterly investor report (QIR) for each investment fund are available on curate.co.za.

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