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THE ART OF INVESTING

Curate Momentum Global Quality Equity Feeder Fund

Managed by Evenlode Investment

Fund overview

- This is a specialist portfolio of global shares, investing only in high-quality companies.
- The fund aims to deliver strong positive growth over periods of seven years and longer, but returns can be variable over the short term.
- It aims to provide investors with some downside protection in falling markets.
- The fund can be used as part of a diversified global portfolio.

What this fund aims to do:

- The Curate Momentum Global Quality Equity Feeder Fund is focused on delivering long-term returns by investing in shares listed around the world.
- This portfolio may underperform the global index when markets are moving strongly upward but is designed to provide some protection at times when markets fall.
- Evenlode has developed a comprehensive system to identify and manage the many risks in the market, with the goal of protecting investors' money.
- The fund can be used within a diversified global portfolio, or as part of the global allocation of a broad balanced portfolio.

'We want to invest in high-quality businesses that are able to compound their cash flows over the long term, and we want to invest in them at reasonable prices. It's not just about having a high return on invested capital today, but more importantly, that it will last a significant period into the future. We want to see that durability of return.'

– Chris Elliott, Portfolio Manager

How this fund invests:

This fund invests only in high-quality companies that operate in growing sectors, have low capital costs, durable competitive advantages, and reinvest in their own growth.

This approach, known as quality investing, has been proven to contribute to investment performance over time as these businesses are able to continually grow their profits.

The fund places a great deal of emphasis on analysing not just each company's current quality but what threats it might face and how well it will be able to continue to perform into the future.

Led by portfolio managers Chris Elliott and Cristina Dyer, Evenlode takes a team-based approach to finding new ideas, conducting a thorough analysis, and identifying the right price at which to buy the shares they hold.

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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