

# ANCHOR GLOBAL EQUITY FUND

## A CLASS

A

### PROFILE AND OBJECTIVE

- Long-term capital growth.
- A concentrated portfolio of high-quality, growing companies that are attractively valued.
- Companies are selected from both developed and emerging markets.
- A higher risk profile.

### WHO SHOULD INVEST

Investors with long-term investment horizons.

### FUND INFORMATION

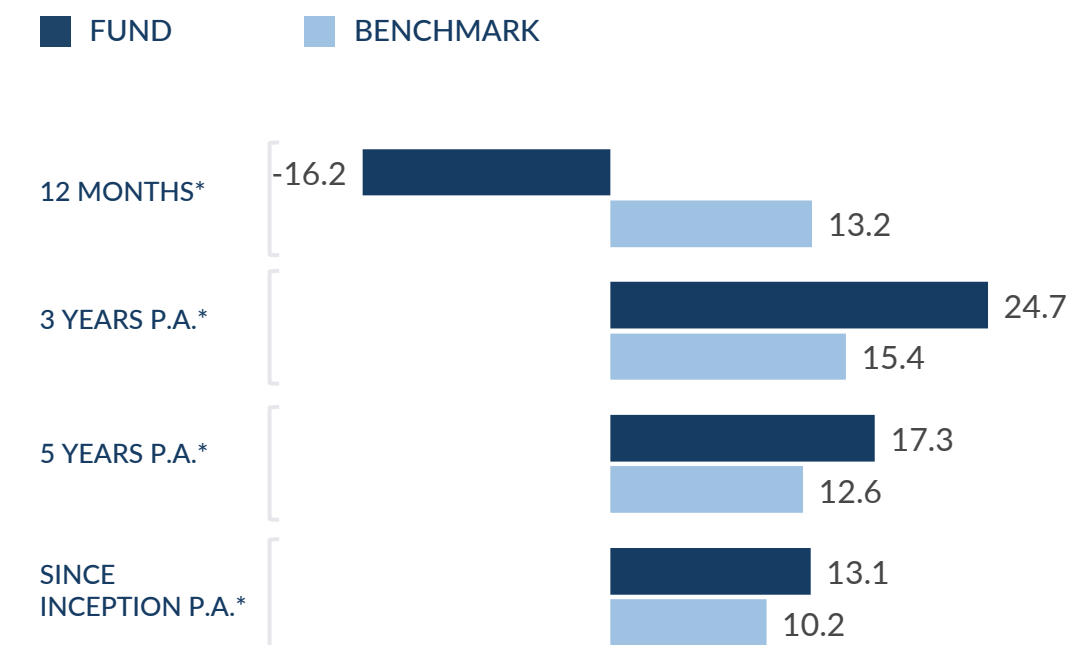
#### Risk profile:

LOW LOW-MOD MOD MOD-HIGH HIGH

Inception Date	March 2015
Benchmark	MSCI World All Country Total Return Index
Minimum Investments	\$1,000
<b>Fees:</b>	
Annual Management Fee	1.25% p.a. (incl. VAT)

### FUND INFORMATION AT 31 JANUARY 2022

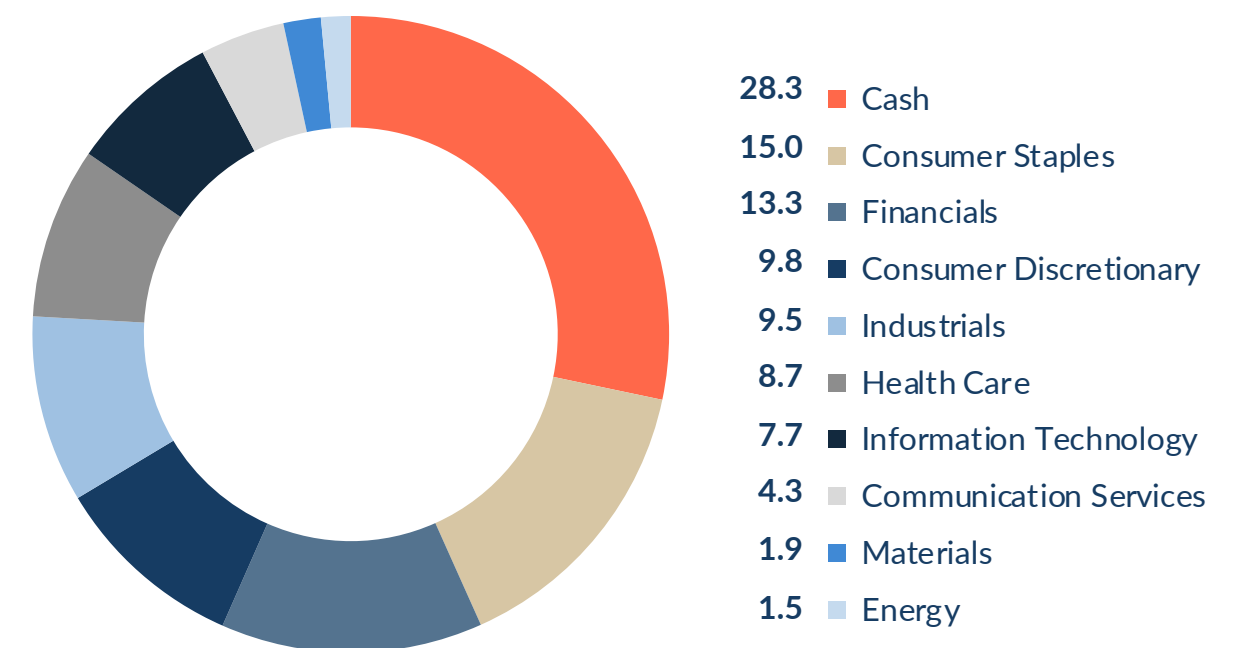
### FUND PERFORMANCE (%)



### TOP TEN HOLDINGS



### SECTOR ALLOCATION (%)



\*Annualised return is the weighted average compound growth rate over the period measured.

Note: Past performance is not necessarily an indication of future performance. Returns provided are provisional and may be subject to change. Consult the Minimum Disclosure Document for full disclosure on fees, performance, etc. This is available at [www.anchorcapital.co.za](http://www.anchorcapital.co.za)

# ANCHOR GLOBAL EQUITY FUND

A CLASS



IN A NUTSHELL



“Most of our holdings will emerge stronger than ever post-crisis”

The Anchor Global Equity Fund invests in companies with multi-bagger potential over the next 5 to 10 years.

COVID-19 is accelerating these underlying trends – most of our holdings will emerge stronger than ever post-crisis.

At present, we are forecasting a 16.5% p.a. gross return over the next three years (*note that all the usual caveats apply*).

These companies are highly innovative and are disrupting their legacy competitors.

These characteristics mean our holdings should be relatively defensive if the crisis worsens or continues longer than expected, while providing attractive upside longer term.

**Risk:** Apart from the usual risks pertaining to equities, the fund will likely underperform if there is a very strong reflationary wave, which benefits cyclical value sectors. That said, the fund would likely still deliver decent absolute returns.



# CONTACT US

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