

Our global equity OEIC strategy celebrates its 1-year anniversary

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Launched on the 15th May 2020, FP Carmignac Global Equity Compounders is a global equity fund managed by Mark Denham and Obe Ejikeme, which aims to deliver long-term returns by investing in sustainable high-quality compounders.

Thanks to a well-oiled investment process, the Fund is living up to its promises, delivering a performance of +32.73% since its launch over 1 year ago versus +31.41% for the comparative benchmark¹, despite particularly complex and volatile markets.

A strategy focusing on...

Quality

We focus on finding companies that exhibit the characteristics we believe are needed to successfully grow over time, that is, high quality companies with sustainable profitability, “compounders” that reinvest their earnings for future growth.

Cyclicality

Rather than flipping over the entire book when a cycle rotation is brewing, we adjust the sizing of our positions, tilting the portfolio in a more cyclical or defensive way, based on our view of the cycle. This has allowed us to mitigate the impact of the sector rotation that has been taking place since late 2020.


Sustainability

We believe companies with strong ESG profiles do better over time. Thus, we analyse the firms’ ESG practices alongside conventional financials, excluding those operating in harmful sectors or conflicting with our principles, while favouring those making a positive contribution to society or the environment.

Want to know more?

[Listen to Mark Denham & Obe Ejikeme](#)

¹ As of 15/06/2021. For the A GBP acc share class. Comparative benchmark: MSCI World (USD), reinvested net dividends. Converted daily, for unhedged share classes into the reference share class currency and into EUR for hedged share classes. Past performance is not necessarily indicative of future performance. Performances are net of fees (excluding possible entrance fees charged by the distributor). The return may increase or decrease as a result of currency fluctuations.



FP Carmignac Global Equity Compounders A GBP ACC

ISIN: GB00BMGLBK75

Recommended
minimum
investment horizon



Main risks of the Fund

EQUITY: The Fund may be affected by stock price variations, the scale of which is dependent on external factors, stock trading volumes or market capitalization.

CURRENCY: Currency risk is linked to exposure to a currency other than the Fund's valuation currency, either through direct investment or the use of forward financial instruments.

DISCRETIONARY MANAGEMENT: Anticipations of financial market changes made by the Management Company have a direct effect on the Fund's performance, which depends on the stocks selected.

The Fund presents a risk of loss of capital.

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