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Artisan Global Discovery Fund rated Recommended by Zenith

Copia Investment Partners is pleased to announce the Artisan Global Discovery Fund has been awarded a 'Recommended' rating by Zenith Investment Partners.

The Artisan Global Discovery Fund is an Australian domiciled unit trust distributed by Copia that invests exclusively in the Artisan Global Discovery UCITS Fund (UCITS Fund). The UCITS Fund is managed by the Artisan Partners Growth Team and provides investors with a benchmark unaware global small-mid cap equities exposure.

Artisan's Growth Team seeks to invest in companies with an accelerating profit cycle, trading at a discount to valuations. The Growth Team prefers quality companies, with high market share or a dominant intangible asset that can provide a company with an enduring franchise.

In its report, Zenith states "Despite the recent inception of the Artisan Global Discovery Fund, Zenith gains comfort from the team's long-standing investment process, which has produced highly attractive investment outcomes."

Although Artisan Global Discovery Fund, an Australian unit trust, was launched in June 2020, the underlying Artisan UCITS Fund was launched in August 2017 and has now reached its three-year anniversary.

Fund Facts

- UCITS Fund typically holds 40 to 60 stocks
- UCITS Fund median market capitalisation is \$US16.4 billion (31 August 2020)
- Utilises a feeder fund structure

Using the Artisan Global Discovery Fund

The Artisan Global Discovery Fund is designed to be used by investors as part of a global equity allocation, as small and mid-sized companies are often overlooked in portfolios and yet they have the potential for higher compound returns than large companies.

With a focus on small and mid-cap companies, the Artisan Global Discovery Fund is designed to fill a potential gap in many Australian investor portfolios, particularly those where one large cap global equity fund represents the total international holding.

A global small and mid-cap strategy may also complement an Australian equity portfolio allocation, with a higher weighting to the healthcare and IT sectors, while the ASX/300 Index has a higher weighting to the financials sector.

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