

LeifBridge
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THE ELITE 11: FUNDS THAT FORM OUR TOP FOOTBALL TEAM

With the final of the UEFA Euro Championship spectacle upon us, we thought we'd put together a football team consisting of some of our favourite funds. The key criteria is for the selected funds to represent a player and their specific position, and of course, have a sustainable competitive advantage which would ensure persistent alpha relative to the opportunity cost, alongside a strong alignment of interest between investors in the fund, and the manager. Through our vast knowledge of football, we have decided that a 4-3-3 formation would be best for this Funds team to perform at the highest level.

With that in mind, here we go:

GOALKEEPER

Strategy: Gold

Manager: iShares Physical Gold ETF

Gold has provided investors with stability and security for 5,000 years. Its intrinsic value and reliability in times of economic uncertainty mirror a goalkeeper's need to provide consistent and reliable defence, ensuring the team's stability under pressure. It is your last line of defence and will shine when the going gets tough.

DEFENCE

RIGHT BACK:

Strategy: Asian Equity Income

Manager: Prusik Asian Equity Income

Prusik, we believe, represents the defensive solidity of a high quality right back', as well as the ability to provide that offensive support in a break forward. The strategy's focus on attractive value alongside sustainable and growing yields ensures attractive levels of steady income alongside the potential for revaluation. Adaptability, stamina, and strategic positioning – what more do you want from a high quality right back?

RIGHT CENTRE BACK:

Strategy: Event Driven Special Situations

Manager: GA Courtenay Special Situations

Just as a right centre back must provide strong defensive capabilities and manage risk, the GA Courtenay Special Situations Fund seek to capitalise on often misunderstood, event-driven opportunities while

minimising risks, through an in-depth understanding of M&As and a highly differentiated approach. A standout performer, strong defensive characteristics with significant long term alpha potential.

LEFT CENTRE BACK:

Fund Strategy: Trend Following

Manager: KLS BH-DG Systematic Trading

The KLS BH-DG Systematic Trading Fund is a trend following strategy with a strong, long-term track-record, lower volatility profile, exceptional risk management and uncorrelated return profile that will scare most strikers out of the box. Their ability to systematically capitalise on market trends reflect the centre back's need to read the game, anticipate threats, and to intervene to ensure stability and eliminate threats.

LEFT BACK:

Strategy: European Quality Growth Equity

Manager: Martin Currie European Long-Term Unconstrained

The Martin Currie Long Term Unconstrained strategy, headed up by Zehrid Osmani, embodies the left back's role of combining defensive reliability with offensive support. Their focus on high quality, growth-oriented investments with a resilience to economic uncertainty mirrors the left back's duties of both fortifying defence and enhancing attack. Exceptional long-term alpha if you are willing to take on some short-term volatility.

MIDFIELD

RIGHT CENTRAL MIDFIELDER:

Fund Strategy: US Midcap Growth Equity

Manager: Granahan US SMID Select

The fund managed by Granahan CIO, David Rose, represents exceptional offensive potential. Their willingness to really focus on a handful of exceptional long-term opportunities reflects an attacking midfielder's role in driving forward momentum, making a break, even scoring the goal themselves. This star midfielder has had a tough couple of years, but we believe the opportunity here is immense!

CENTRAL MIDFIELDER:

Fund Strategy: Multi-Asset

Manager: LeifBridge Systematic Multi-Asset

LeifBridge's role is to maintain balance and control, remain nimble, and deliver consistent outcomes. LeifBridge's diverse universe, systematic process and focus on risk management mirrors the midfielder's duty to manage the game's tempo, distribute the ball effectively, and support both defensive and offensive plays with reliability and adaptability.

LEFT CENTRAL MIDFIELDER:

Fund Strategy: US Equity

Manager: Eagle Capital US Equity

Investing in this high quality, US Equity fund reflects the left central midfielder's blend of energy, creativity, and balance between defence and attack. This fund's focus on high-quality companies that are undervalued but with exceptional earnings power, in a concentrated portfolio, parallels the midfielder's role in maintaining composure, supporting various phases of play, and driving consistent performance with focus and awareness.

ATTACK

RIGHT WING:

Fund Strategy: Life Sciences / Healthcare Equity

Manager: BlueBox Precision Medicine

Change and impact! The BlueBox Precision Medicine fund represents the right wing's role in delivering dynamic, high-impact outcomes. This fund's focus on innovative life sciences companies driving the era of personalised medicine mirrors the winger's need for creativity, and goal-scoring ability in a fast-paced environment, emphasising the pursuit of breakthroughs and substantial contributions to the team's success.

LEFT WING:

Fund Strategy: AI

Manager: Polar Artificial Intelligence

No team should ignore the opportunity presented by Artificial Intelligence. A tactical left wing(man) for every team! It is not cheap…but neither is Mbappe nor Messi! The strategy aligns with the left wing's emphasis on attacking prowess and innovation. This fund's investment in quality companies benefitting from the adoption of artificial intelligence, reflects the winger's role in pushing boundaries, creating scoring opportunities, and providing decisive contributions to the team's offensive efforts.

STRIKER:

Fund Strategy: Trend Following

Manager: Bowmoor Global Alpha

We believe Bowmoor represents the striker's role as the primary goal scorer, requiring sharp instincts and adaptability. Their ability to capitalise on market trends mirrors a striker's knack for anticipating plays. This agility allows for quick, decisive moves, consistently delivering results and underscoring the importance of seizing opportunities, while maintaining focus on achieving successful outcomes. Bowmoor is a winner and ‘must have’ in all teams and portfolios!

CONTACT US

For further information on any of our services, or if you would like to arrange a meeting with an investment manager to see how we can work with you, please get in touch.

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