

# Identifying global trends to capture long-term growth

### Why invest?

C WorldWide uses a thematic approach to identify long-term, global structural growth trends in demographic, global consumer, technology, resource and political areas. Then, they pick stable growth stocks that align with these trends.

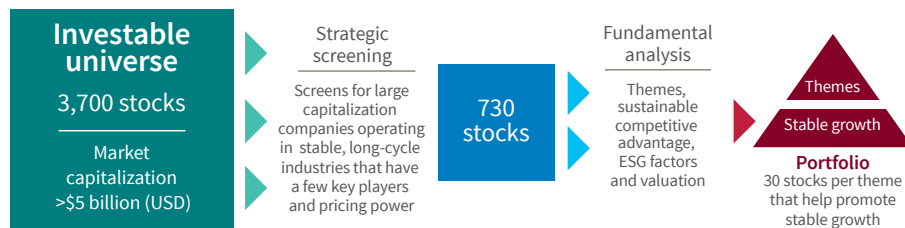
To help capture the potential for long-term growth when constructing the fund's portfolio, the portfolio management team strategically focuses on large-capitalization companies that operate in stable, unregulated industries, which have only a few key players and pricing power. The team also looks at environmental, social and governance (ESG) factors, valuation and competitive advantages, to help determine the company's potential future financial performance.

### Investment objective

The Fund seeks to achieve long-term capital appreciation by investing primarily in equity securities of companies in any country outside of Canada and the United States. The Fund may obtain this exposure by investing directly in securities, by investing in securities of other investment funds, or by a combination of these means.

### Investment philosophy: using top-down stock selection to generate consistent returns

C WorldWide focuses on global trends and long-term investments to create a concentrated portfolio of stocks that can help generate consistent returns over the long term, regardless of market volatility.



#### Firm name:

C WorldWide Asset Management

#### Risk rating:

Moderate



#### Competitive advantages

- They have a 30-year institutional track record supported by a specialized team of 20 international equity experts
- Their investment approach leverages a trend-based stock picking tool that incorporates bottom-up stock picking while also looking themes and market trends. This leads to a highly concentrated portfolio of about 30 companies
- They also have a highly disciplined process that follows a “one stock in, one stock out” philosophy. This helps create a constant, high-conviction portfolio

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# International Concentrated Equity

## Meet the managers



### **Bo Knudsen, M.Sc, Portfolio Manager**

Bo has almost 30 years' experience working with the portfolio management of global equities.

Bo worked for five years as a portfolio manager with Danske Capital (the asset-management division of Danske Bank) and ultimately held the position as Head of International Equity Investments. From 1994 to 1998, he worked as a Portfolio Manager with C WorldWide Asset Management. After three years as the Executive Director and Head of Equities with Nordea Investment Management, he re-joined C WorldWide Asset Management.



### **Bengt Seger, MA, Portfolio Manager**

Bengt has 33 years' experience and has worked as a portfolio manager with C WorldWide Asset Management since 1992. Previously, he was a senior analyst within international equities in the C WorldWide group from 1988 to 1992.

Prior to joining C WorldWide, he worked as an analyst and a portfolio manager with Sparbanken Skåne in Sweden.



### **Lars Wincentsen, BBA, Portfolio Manager**

Lars has 28 years' experience, working with Danske Capital prior to joining C WorldWide Asset Management in 1998. He was a senior portfolio manager with Danske Capital for eight years, and ultimately held the position as Head of International Equity Investments.



### **Mattias Kolm, BA, M.Sc, Portfolio Manager**

Mattias has 18 years' experience, and prior to joining C WorldWide Asset Management in 2003, he worked in corporate finance at Svedala Industri and as a Portfolio Manager at SEB Enskilda Bank.

## **The C WorldWide Asset Management\* story**

Established in 1986, C WorldWide Asset Management is a team of international equity specialists based in Denmark. The firm identifies long-term, global trends and uses in-depth, fundamental stock picking to capitalize on opportunities from around the world. The team focuses on managing concentrated, high conviction portfolios with low turnover. As of June 30, 2018, C WorldWide's investment team managed more than \$25.5 billion.

\*C WorldWide is available through Pier 21 Asset Management

This fund is available through a segregated funds policy issued by The Canada Life Assurance Company. Make your investment decisions wisely. A description of the key features of the segregated fund policy is contained in the information folder. **Any amount allocated to a segregated fund is invested at the risk of the policy owner and may increase or decrease in value.**

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