



genuine **EDGE**™

Giving you the edge to achieve a positive future



What is genuine**EDGE**TM

Giving you the edge to achieve a positive future

Designed for younger generations who have longer investment timeframe or high net-worth investors who are looking for enhanced returns at relatively higher risks for part of their investment portfolios. The Genuine EdgeTM Portfolio invests in the major thematic that can provide investors higher than average growth opportunities by choosing the 'edges' that are likely to outperform over the next 10 to 20 years. The portfolio is constructed as a unique offering for investors who are **investing in the future, investing for a future.**

THE FOUR **THEMATICS**

INDIAN SHARES

25%

Large population and relatively young demographic to drive growth across different sectors with existing and emerging opportunities. India ranks no.2 in the list of countries by population¹ and is set to play an increasing role in the world economy with continuous efforts for reforms to support sustainable growth².

GLOBAL SMALL COMPANIES

25%

Global smaller companies have been found to exhibit more attractive risk-return characteristics than their large-cap counterparts and are likely to offer additional diversification to an investor's investment portfolio³. Small-cap companies are normally more focused on specific products or services within a niche market, which are likely to expand faster with the potential of longer periods of compounding growth.

GLOBAL HEALTH CARE

25%

The healthcare sector will continue to be at the forefront of research and development amid rising demand from a larger middle-class demographic, bigger aging population and longer life expectancy⁴. From mobile wellness and fitness technologies to advancements in disease detection and treatment, healthcare remains an essential theme of a better future.

ROBOTICS AND ARTIFICIAL INTELLIGENCE

25%

Robotics, AI and automation have developed dramatically with increasing focus on driving efficiency and productivity into many new areas that will have a profound effect on our lives. From cloud-based service to 3D-printing or near-real-time translation, the market has seen many 'disruptors' expand rapidly with resilient profit growth. Companies that are the true pioneers of the industry will continue to invest and to innovate, creating new opportunities for investors to take part in these changes that are or will be the trends in the future.

1. Source: <https://www.worldometers.info/world-population/india-population/>

2. Is South Asia Ready for Take Off? : A Sustainable and Inclusive Growth Agenda, Manuela Goretti, Daisaku Kihara, Ranil M Salgado and Anne Marie Gulde, November 2019

3. Why global small-cap stocks are becoming an important part of institutional portfolios, Raina Oberoi, MSCI, Mar 2017

4. Source: <https://www.pwc.com/gx/en/industries/healthcare/emerging-trends-pwc-healthcare.html>

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BROAD EXPOSURE

Easy access to a wide range of companies in different sizes, various sectors and regions.

ACTIVE OVERLAY

Sophisticated traffic light management approach to smooth out volatility by providing some certain downside protection to your portfolio.

KEY BENEFITS

Giving you the edge to achieve financial success

COMPETITIVE PRICING

Cost effective and competitive pricing aiming to empower investors with greater returns.

IN-DEPTH EXPERTISE

Experienced investment experts continuously monitor and review the portfolio construction and rebalancing process to oversee the investment performance.

THOROUGH RESEARCH

Strict selection disciplines to identify 'themes' that may offer stronger returns and screen out underlying investments that are aligned with our investment beliefs and have robust investment process.

INVESTMENT COMMITTEE



Emmanuel Calligeris

BEC MBus (Finance)

Emmanuel is Chairman of the CARE Investment Committee. Emmanuel holds a degree in economics and worked as the Chief Investment Officer for OnePath Investments (the investment arm of ANZ Bank) for over 20 years where he was responsible for \$13 Billion of funds under management.



Grahame Evans

GAICD DipSM MBA

Grahame is the risk and compliance member of the CARE Investment Committee. Grahame brings over 35 years of financial service industry experience.



Dr. Mark Brimble

BCom(Hons) PhD CPA FFin

Mark is an independent member of the CARE Investment Committee. Mark holds a doctorate in capital markets and is keenly interested in investor behaviour.



Rob McGregor

SIA (Aff) ADFP

Rob was a founder of GPS Wealth, developed the CARE Investment Philosophy over the last 15 years and successfully managed \$100m in clients' funds during the GFC.

CONTACT YOUR ADVISER



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