

PRESS RELEASE

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Heptagon Capital is celebrating the fifth anniversary of Heptagon Future Trends Equity Fund

London-based Heptagon Capital ("Heptagon"), the \$13.7bn (as of 31 December 2020) asset management firm, has just marked the fifth anniversary of the Heptagon Future Trends Equity Fund with approximately \$175 million in assets under management as of 31 January 2021.

Since its inception in January 2016, Citywire AA-rated Fund Manager Alexander Gunz seeks to identify and invest in a diverse range of businesses offering exposure to the key trends that he believes will help shape the future. These themes naturally align with the United Nations Sustainable Development Goals, which he believes have the potential to sustainably grow in importance regardless of the economy and regulation. The portfolio has always been highly concentrated (20-25 names since launch) with low levels of turnover (typically <20% a year). The Fund is sector, size and geography agnostic, with high active share (typically over 95%).

The Fund received 5 Sustainability Globes from Morningstar and achieves a top percentile ranking versus its peers. The Fund has generated an annualised return of 18.33% vs 13.23% for the MSCI World since inception to 31 January 2021 with a Morningstar Rating of 4 stars.

"We have been writing about and investing in future trends successfully for the last five years", said Alexander Gunz, Fund Manager of the Future Trends strategy. "We continue to believe that the long-term trends to which we have exposure will grow in importance, broadly regardless of the economic backdrop. The benefits of pan-thematic diversification and a concentrated portfolio have been evident in the returns the Fund has enjoyed since inception. Looking forward, our goal remains unchanged; finding new themes and leading businesses, while being ever-conscious of ESG imperatives."

Past performance is no guide to future performance and the value of investments and income from them can fall as well as rise.

About Heptagon Capital

Heptagon was founded in 2005 by former Morgan Stanley directors, including Eran Ben-Zour, Tarek Mooro and Fredrik Plyhr; and provides Institutional and Ultra High Net Worth investors creative, class-leading investment opportunities across traditional and alternative asset classes. Click [here](#) to discover our website.

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