

PRESS RELEASE
19th April 2023

Heptagon Future Trends Hedged Fund wins a Refinitiv Lipper Fund Award

London-based Heptagon Capital (“Heptagon”) is proud to announce that the Heptagon Future Trends Hedged Fund has won the Refinitiv Lipper Fund Award 2023 in both the Nordics and Austria in the Alternative Long/Short Equity Global category over 5 years. The Irish UCITS fund is managed by in-house Fund Manager Alexander Gunz.

The Fund was launched in March 2018 and has been led since inception by Alexander Gunz. It comprises a long book of equities overlaid with index futures as a way of managing volatility. The equity book is identical to that deployed in the Future Trends Equity Fund, which was launched a few years earlier, in January 2016. Combined the Future Trends strategy has over \$150m of assets under management.

The Fund seeks to identify and invest in a diverse range of businesses offering exposure to the key trends which we believe will help shape the future. These naturally align with the United Nations Sustainable Development Goals, which the Fund Manager believes will 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), while also using index futures to reduce volatility. The Fund is sector, size and geography agnostic, with high active share (typically over 95%) and has exposure to themes including alternative energy, food innovation, healthcare solutions, water and payment solutions.

Commenting on the win, Alex, the Fund Manager, said; “We are delighted that the Heptagon Future Trends Hedged Fund has won the 2023 Refinitiv Lipper Fund Award. It is a reflection, we believe, of the uniqueness of the strategy.”

Heptagon’s Chief Investment Officer, Arnaud Gandon, added; “The Heptagon Future Trends Hedged Fund is one of thirteen Funds on Heptagon’s UCITS platform. Across our range, we seek to provide investors access to robust strategies which can help them to meet their objectives.”

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. Heptagon Capital actively advises on and manages over \$15.0bn in assets, as of 31st March 2022. Discover our website here www.heptagon-capital.com.

About Refinitiv Lipper Fund Awards

For more than 30 years and in over 17 countries worldwide, the highly-respected Refinitiv Lipper Awards have honoured funds and fund management firms that have excelled in providing consistently strong risk-adjusted performance relative to their peers and focus the investment world on top-funds. The merit of the winners is based on entirely objective, quantitative criteria. This coupled with the unmatched depth of fund data, results in a unique level of prestige and ensures the award has lasting value. Renowned fund data and proprietary [methodology](#) is the foundation of this prestigious award qualification, recognizing excellence in fund management. Find out more at www.lipperfundawards.com.

Disclaimer

The Refinitiv Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers.

The Refinitiv Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is a risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the Refinitiv Lipper Fund Award. For more information, see www.lipperfundawards.com. Although Refinitiv Lipper makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Refinitiv Lipper.

Press contact

Ona Kohonen
T +44 20 7070 1831
63 Brook Street, London W1K 4HS
www.heptagon-capital.com