



Trading Idea IF

# Capital Group New Perspective Fund

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**Our Chief Investment Office (CIO) believes that after strong years for equities in 2023 and 2024, there is further upside in 2025. CIO views the outlook for equities as constructive from a macroeconomic, structural, and bottom-up perspective. The combination of resilient US growth and lower Fed rates has historically been a powerful combination for stocks. However, managing the global equity exposure flexible is a very complex task and we recommend delegating to the best equity managers available.**

One of our solutions to invest in equities globally is the **Capital Group New Perspective Fund**. This fund offers the following characteristics:

- **Large research resources** - Capital is one of the largest privately held investment management organizations in the world with more than 80 years of investment experience.
- **Unconstrained investing** - The managers' complementary investment approaches (multiple portfolio manager investing autonomously) help create a well-diversified portfolio of around 200 – 250 holdings
- **Long-term track record** - Since its launch in **1973**, the strategy has weathered many different market conditions and has fared better than the broader market especially also in down markets.
- **Access to top talent** - Only experienced and successful Capital portfolio managers are assigned to co-manage this large strategy.
- **Diversification** - As their main source of expected alpha is achieved through bottom-up stock selection, the historical performance is well diversified through the different sectors.

- Attractively priced **negotiated shareclasses** for contracted clients

**Risks:** The fund invests in equities and is thus riskier than cash or bonds as price movements may fluctuate based on market participants changing assessments of risks and opportunities for a specific company. The fund pursues an active management style and hence performance can deviate from the broad equity market. The fund invests into equities in different currencies which can impact the value of the investment. Additional information about these and other risks can be found in the KID as well as in the prospectus of the fund. Past Performance is no indication of future results.

The above information is for marketing purposes and should not be considered as personal investment advice.

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