

## **iM Global Partner adds Polen Capital's latest US equities strategy to its OYSTER range**

- The OYSTER US Small and Mid Company Growth fund, part of the international equities range of OYSTER, is managed by Polen Capital, a historic partner of iM Global Partner
- The strategy of the fund seeks to achieve long-term growth by building a concentrated portfolio of outstanding businesses
- With this new strategy launched by Polen, European investors can access the growth potential of the small and mid caps US equity market.

**Paris, London, 10 July 2020**, iM Global Partner announces the launch of the U.S. Small and Mid Company Growth fund as part of the OYSTER range. The fund is managed by Polen Capital, which has more than 31 years of experience investing in high-quality growth companies. The strategy targets high-quality small and medium-sized companies with attractive growth characteristics, predictable cash flows, and sustainable high returns on capital. The strategy seeks to benefit from both the inherent growth advantage of investing early in a company's lifecycle and long-term compounding. The OYSTER US Small and Mid Company Growth fund replaces the OYSTER US Selection fund on the platform, allowing European investors to access a new strategy focusing on small- and mid-size US equities almost at the same time as it is made available to US investors.

### **A global investment firm focusing on growth equities strategies with a long-term approach**

iM Global Partner entrusts Polen Capital with the management of the OYSTER US Small and Mid Company Growth fund based on Polen's new innovative strategy launched at the beginning of Q2 2020 and made available to US investors. The portfolio is composed of companies that Polen believes can deliver sustainable growth and high returns on capital over a long-term time horizon. Companies are selected through a meticulous fundamental research process, historically part of Polen's DNA. This process seeks to identify companies with durable earnings profiles driven by sustainable revenue growth, high returns on capital, proven management teams and powerful products/services. Polen Capital holds the view that such exceptional companies not only have the potential to contribute outsized returns to the portfolio, but are also inherently less risky—a company with greater earnings stability and financial strength may offer a “margin of safety” that typically results in less volatility in down markets. The strategy is managed by a dedicated team established in 2017 and based in Boston.

**Philippe Uzan, CIO Asset Management of iM Global Partner, adds**, "Polen Capital's unique concentrated approach makes it one of the strongest global equity managers in the world, and their strategy dovetails with their ability to identify tomorrow's leaders. This partnership will offer clients the opportunity to invest early in the lifecycle of US SMID cap companies where, if chosen carefully, growth potential can be very strong."

**Rayna Lesser Hannaway, CFA - Portfolio Manager & Analyst at Polen Capital explains** "We invest in companies that we believe have strong competitive advantages, repeatable sales processes, robust business models, effective management teams, and good long-term strategies. The reason why we own so few companies is because the types of businesses that we look for can be hard to find. We believe we add value through our experience in finding financially strong companies that we think

exhibit these characteristics, in an effort to seek high returns on investments to iM Global Partner's clients."

#### Fund specifications

	<b>Class I (Institutional)</b>	<b>Class C (Retail)</b>
<b>ISIN code</b>	LU0933609405	LU0747343753
<b>Currency</b>	USD	USD
<b>Management fees</b>	0.75%	1.50%
<b>TER</b>	1.07%	1.89%
<b>Minimum investment</b>	1,000,000	-
<b>Inception date</b>	06/08/2013	10/03/2016
<b>Management tenure change</b>	24/06/2020	24/06/2020
<b>SRRI risk/reward profile</b>	5	

#### About iM Global Partner

iM Global Partner is a global investment and development platform dedicated to active asset management with main offices in Paris, London, Luxembourg, and Philadelphia. iM Global Partner selects and partners with exceptionally talented independent asset management companies through long term direct capital ownership with the objective to create value for clients, Partners and shareholders.

iM Global Partner is building a comprehensive range of investment solutions mixing iM Global Partner range of products, which includes the OYSTER range, a UCITS Luxembourg fund, Mutual Funds and ETFs dedicated to the US, and best in class strategies managed by our Partners. iM Global Partner currently has strategic minority investments in six Partners across asset classes and geographies. Thanks to a strong and experienced business development arm based in 10 locations across Europe and the US, iM Global Partner facilitates access to its Partners, while accelerating their business growth at the same time.

iM Global Partner represents assets under management of \$15.8 billion USD as of June 2020, in proportion to its participations in each Partner.

[www.imgp.com](http://www.imgp.com)

#### About Polen Capital

Polen Capital is a global investment management firm advising more than \$45 billion in assets as of July 2020 and providing high value-added, quality growth investment strategies to a wide range of institutional and individual clients around the world. Since 1989, the firm has been committed to attracting, developing, and retaining exceptional professionals who are aligned with our goal of preserving and growing our clients' assets to protect their present and enable their future. Polen Capital has three autonomous investment teams that oversee a global equities universe of high-quality growth companies: the Boca Raton-based Large Company Growth team, Boston-based Small Company Growth team, and London-based Emerging Markets Growth team. The firm has been recognized by Pensions & Investments as one of the industry's "Best Places to Work" in each of the past four years.

[polencapital.com](http://polencapital.com)

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in the Fund's units. The value of the units referred to may fluctuate and investors may not recoup all or part of their original investment. Investors should consult the key information for investors ("KIID") and Fund prospectus available on <https://www.imgp.com> for further details on the risks involved.

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