

# A good curator selects only the best

## Five years of outperformance: The potential of global enhanced indexing

Our Curate Global Emerging Markets Equity Fund and Curate Global Sustainable Equity Fund, managed by Robeco, have turned five years old. During this period, the funds have outperformed the MSCI EM Index and MSCI World Index, respectively, and outperformed their respective peer groups. We believe these funds are a more efficient alternative to passive investing given their better return potential and better company selection.

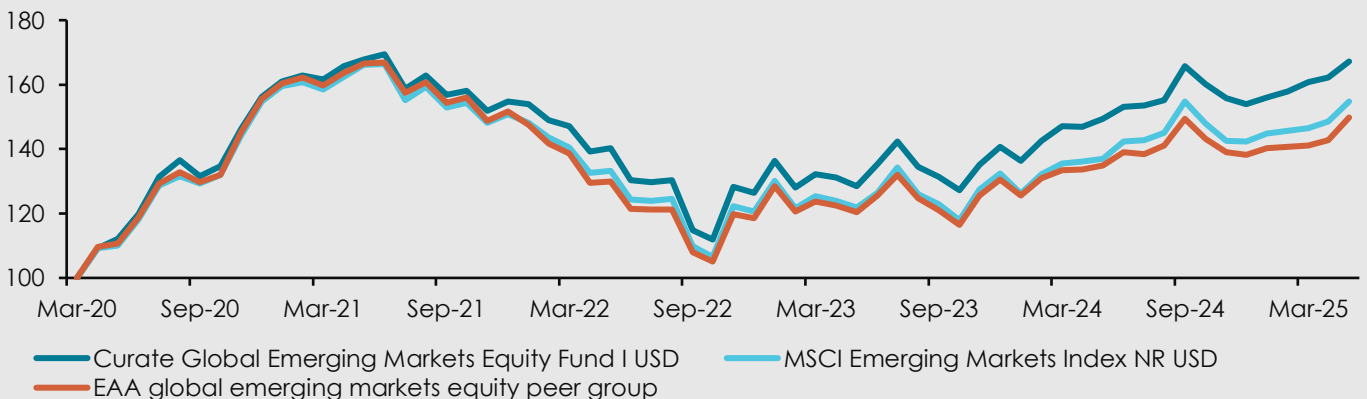
### Fund overview

The **Global Emerging Markets Equity Fund** is designed for investors who specifically want access to a portfolio of listed shares in emerging markets such as China, India, South Korea, and Brazil. Over long periods, it offers the potential for high returns, but there can be a significant amount of variability in performance over shorter periods.

The **Curate Global Sustainable Equity Fund** invests in a large, diversified portfolio of shares listed on global stock markets, with a specific focus on companies that demonstrate higher levels of sustainability. Using systematic, data-based models, it aims to deliver returns ahead of global stock markets but with lower long-term risks.

### Curate Global Emerging Markets Equity Fund

#### Cumulative returns compared to its benchmark and peer group



**Source:** Morningstar using I-class in US dollar terms (institutional share class with longest return history). Returns from inception of Robeco's management in March 2020 to 31 May 2025.

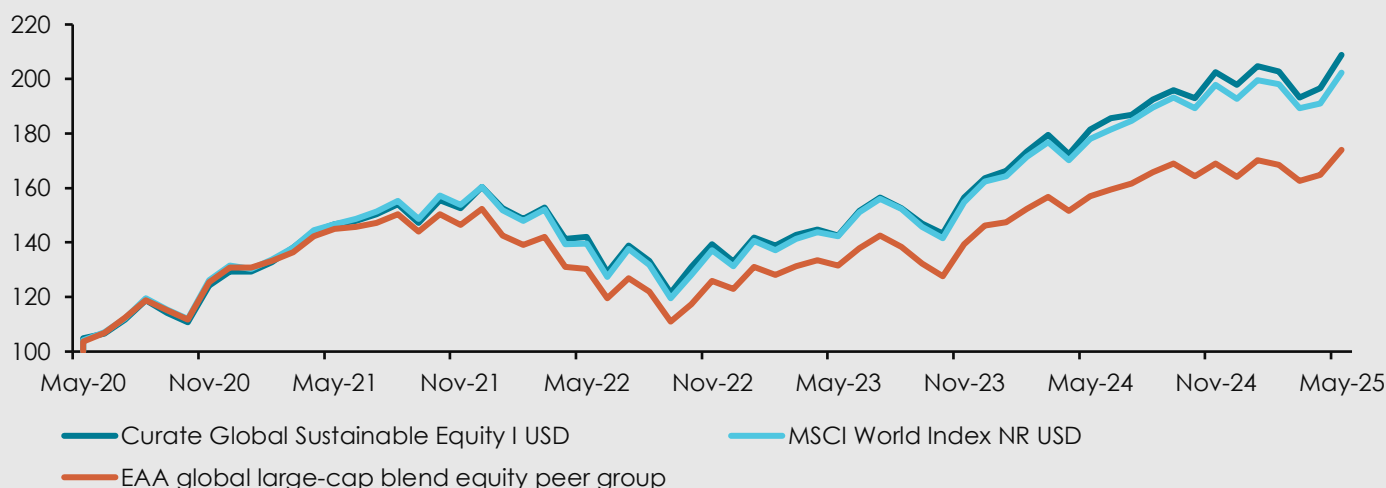
## Highest and lowest returns

	One year	Three years	Five years
Curate Global Emerging Markets Equity Fund I USD	11.94%	6.04%	8.34%
High	26.28%	26.28%	61.58%
Low	7.84%	-29.24%	-29.24%

**Source:** Morningstar using I-class in US dollar terms (institutional share class with longest return history). Highest and lowest returns of the fund/class of fund during the period detailed to 31 May 2025.

## Curate Global Sustainable Equity Fund

### Cumulative returns compared to its benchmark and peer group



**Source:** Morningstar using I-class in US dollar terms (institutional share class with longest return history). Returns from inception of Robeco's management in May 2020 to 31 May 2025.

## Highest and lowest returns

	One year	Three years	Five years
Curate Global Sustainable Equity Fund I USD	15.05%	13.74%	14.79%
High	34.67%	34.67%	40.55%
Low	7.61%	-17.39%	-17.39%

**Source:** Morningstar using I-class in US dollar terms (institutional share class with longest return history). Returns from inception of Robeco's management in May 2020 to 31 May 2025. Highest and lowest returns of the fund/class of fund during the period detailed to 31 May 2025.

Curate's global enhanced index funds, managed by Robeco in Rotterdam, have delivered returns that outperformed their benchmarks since launch. Robeco took over investment management of the Curate Global Emerging Markets Equity Fund in March 2020 and the Curate Global Sustainable Equity Fund was launched in May 2020.

While Robeco has been managing these strategies for us since 2020, the manager has a long track record of managing enhanced index developed market and emerging market strategies since 2004 and 2007, respectively.

### Robeco's global enhanced indexing

We believe Robeco's enhanced index approach could be a useful alternative to passive allocations and a core holding within global portfolios. This approach is leveraged in our Curate Global Emerging Markets Equity Fund and Curate Global Sustainable Equity Fund by Robeco to deliver outperforming returns.

Feature

Passive investing

Robeco's enhanced indexing

Broad market exposure	✓	✓
Predictable risk profile	✓	✓
Low costs	✓	✓
Better return potential	✗	✓
Smart company selection	✗	✓
Improved sustainability	✗	✓

**Source:** Robeco Institutional Asset Management, August 2024, 'The smarter alternative: Enhanced Indexing', page 10, <https://www.robeco.com/en-za/insights/2024/09/the-smarter-alternative-enhanced-indexing#5dikKalt2lhkvPEqexVbXm>, accessed on 26 May 2025.

### Curate's enhanced indexing solutions

Fund	Annual management fee (excl. VAT)	Currency available	Feeder fund available
Curate Global Emerging Markets Equity Fund	0.4% (R-class)	\$	Yes
Curate Global Sustainable Equity Fund	0.3% (R-class)	£ and \$	Yes

If you'd like to learn more about how the Curate Global Sustainable Equity Fund and Curate Global Emerging Markets Equity Fund can be a core allocation for your portfolio, please reach out to one of our Curate fund specialists. Their details are below.

For more information, visit our website [here](#).

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