

## Carmignac Portfolio Grandchildren is celebrating its three-year anniversary

Invest in innovation that cares for the future with Carmignac Portfolio Grandchildren

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Published	Length
August 1, 2022	 2 minute(s) read

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## More than just a fund

Carmignac Portfolio Grandchildren is designed to cover several generations by **investing in “quality companies”**, i.e. those with sound finances and sustainable profitability. These companies often have less debt and high stable margins, making them more cash generative<sup>1</sup>. This allows them to reinvest internally and fuel innovation in order to create additional growth engines.

### What do we mean by quality companies?



Low debt



High and stable  
margins



Reinvestment and  
organic growth



Pricing power

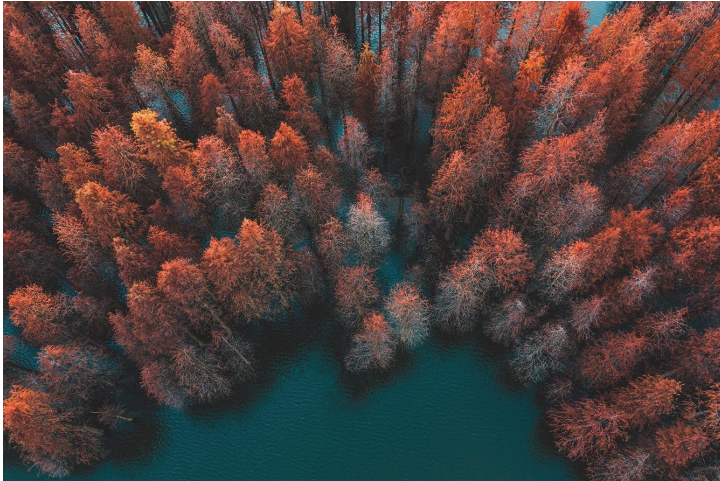


The Fund adopts a unique and robust investment process measuring quality through key metrics. Our selection process enables us to present a **portfolio of 35-45 convictions** from an investment universe of 1,500 stocks. An important asset of our approach is also the **optimisation of market cyclicality**, which is achieved via an active management of position sizing.

[Receive more information about the Fund](#)



## A fund for future generations



Studies shows that wealth transferred through 2045 will total USD 84.4 trillion—with USD 72.6 trillion in assets transferred to heirs, while USD 11.9 trillion will be donated to charities .

The “quality companies” in which we invest have been chosen due to their true long-term growth potential. By investing in such companies, Carmignac Portfolio Grandchildren aims to achieve long-term outcomes and therefore **build a legacy** not only for the investors themselves, but also one that can be passed on from generation to generation.

With this objective of transmission through the generations, we are convinced that, as investors,**it is our responsibility to create value for our clients** through a sustainable approach, and to preserve our world for future generations. We strive to identify firms generating positive change based on the Sustainable Development Goals (SDGs) defined by the United Nations. At Carmignac, we identify nine of the SDGs as ‘investable’, which means that companies in which our funds can invest are able to support the progress towards these goals through their products and services. In this sense, **Carmignac Portfolio Grandchildren has a sustainable objective:** more than 50% of the fund’s AUM is invested in companies with over 50% of their revenues derived from goods and services positively aligned with at least one of the nine ‘investable’ SDGs investable by Carmignac: (1) No Poverty; (2) No Hunger; (3) Good Health and Well Being; (4) Quality Education; (6) Clean Water; (7) Affordable and Clean Energy; (9) Industry, Innovation and Infrastructure; (11) Sustainable Cities and Communities; and (12) Responsible Consumption and Production.



## Invest in innovation that cares for the future

Carmignac Portfolio Grandchildren is designed to cover several generations by investing in “quality companies” to create value for our clients through a sustainable approach.

### Quality drives innovation



**Carmignac Portfolio Grandchildren picks “quality companies” that reinvest their profits for the future as they aim towards sustainable growth.** We engage with companies to discuss their process on how they identify the emerging needs of their changing environment to adapt their strategy. Companies that strive to anticipate changes by investing in R&D will be able to offer consumers innovative products.

Focusing on companies that reinvest their profits, Carmignac Portfolio Grandchildren offers opportunity through businesses that we think could remain profitable by continuously adapting to its environment.

<sup>1</sup>Source: Carmignac, Bloomberg

<sup>2</sup>Source: Cerulli, January 2022



Carmignac Portfolio Grandchildren

# A global, high-conviction equity fund for long-term investors

[click here](#)

## Carmignac Portfolio Grandchildren A EUR Acc

ISIN: LU1966631001

Recommended  
minimum  
investment horizon



### Main risk of the Fund

**EQUITY:** The Fund may be affected by stock price variations, the scale of which is dependent on external factors, stock trading volumes or market capitalization.

**CURRENCY:** Currency risk is linked to exposure to a currency other than the Fund's valuation currency, either through direct investment or the use of forward financial instruments.

**DISCRETIONARY MANAGEMENT:** Anticipations of financial market changes made by the Management Company have a direct effect on the Fund's performance, which depends on the stocks selected.

The Fund presents a risk of loss of capital.

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