



# Eurozone Equity Fund

Eagle Star  
Winner of the 2005 Investment  
Management Excellence Award\*  
\* Financial Services Excellence Awards

## Fund Description

*Indicative equity exposure: Up to 100% of the value of the fund.*

This is an actively managed equity fund which seeks to maximise growth through capital gain and income from a well-diversified portfolio of eurozone equities and equity based financial instruments. The fund managers will manage the fund with the constraint of no individual stock holding representing more than 5% above its weighting in the FTSE Eurobloc Index and any individual stock's weighting capped at 10% of the total fund. In terms of currency the fund is managed from the point of view of a eurozone investor. This fund is managed by Eagle Star.

## Investment Aim

The fund is managed against a benchmark of the FTSE Eurobloc Index. Eagle Star will seek to add value to the Fund and aim to outperform the index through the fund managers' stock selection skills.

## Who should invest in the Fund?

The fund is available as part of the Matrix range for both pension and investment clients. Eagle Star has established the Euro Equity Fund to provide investors with a pure Eurozone equity investment. It can also be used in conjunction with other funds to allow investors to build their own diversified portfolio of investments.

## Eagle Star Equity Expertise

Eagle Star has a strong commitment to equity investment and we have proven expertise in this area. We have established an innovative range of equity funds which provide investors with the opportunity to take advantage of our fund managers' stock selection skills by offering concentrated portfolios in key regions around the world, as well as more broadly based international and eurozone portfolios.

Eagle Star has a disciplined top-down investment process, the key inputs to which are the assessment of the economic and asset cycle. We believe that the macroeconomic environment is the key driver for investment market themes. We are business cycle investors, portfolios being constructed to take advantage of opportunities over all parts of the economic cycle. Portfolios may at any time show either a growth or a value bias depending on prevailing macroeconomic views.

In today's ever-changing investment climate, stability of an investment team is crucial to delivering consistent, superior performance. The leaders of the Eagle Star investment team have worked together for over 15 years. This closely-knit team, integrated across asset classes, ensures the implementation of investment strategy quickly and effectively.

## Significant Features of the Fund

- An actively managed fund in line with Eagle Star's general investment philosophy.
- The fund invests exclusively in eurozone equities.
- Up to 100% equity exposure.
- A maximum weighting of 5% above its index weighting for any one stock.
- A maximum of 10% of the fund in any one stock.

## Further Information

A fund factsheet which includes data updated quarterly on the **Eurozone Equity Fund** is available on [www.eaglestarlife.ie](http://www.eaglestarlife.ie).



**EAGLE STAR**

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