

Global Targeted Returns Fund



If you were one of the many advisors who attended our January investment seminars, you'll know that one of the highlights was the launch of the **new Invesco Global Targeted Returns (GTR) fund** to our Prisma Platform.

Targeting positive returns in all market conditions

Like us, you'll have seen increasing customer demand for capital growth at acceptable levels of risk. The new GTR fund answers that demand, equally targeting returns and managing risk.

Regardless of market conditions, the fund targets a gross return of 5% p.a. (above three month EURIBOR) over any three-year rolling period. And, it aims to do this with less than half the volatility of global equities, over the same timeframe.

The right people and approach

Invesco is a good fit for the Prisma Platform. Like Zurich, active fund management is central to their approach. Based in the US, they are a global provider of investment funds with \$790bn in assets under management*. They build portfolios based on thorough research and analysis to identify the investment opportunities they consider most likely to provide strong, long-term returns.

GTR is managed by Invesco's UK based multi-asset investment team and they have a wealth of experience in the successful development, implementation and ongoing management of multi-asset portfolios.

The three lead fund managers previously worked on the highly successful Standard Life GARS fund and have a combined total of 15 years' experience in delivering targeted absolute return products and, collectively, have over 60 years' investment experience.

Highly diversified and risk managed

Invesco's multi-asset team considers a wide array of investment opportunities across all asset classes, geographies, sectors and currencies. This enables them to identify what they consider the **most attractive investment ideas**.

The GTR fund can invest in a broad range of financial instruments, including derivatives. The combination of traditional assets and derivatives helps the fund managers build a highly diversified portfolio; the use of a wider range of investment approaches can help remove as many constraints as possible in the pursuit of real diversification.

To find out more, download a copy of the [fund brochure](#).

Availability

The fund is available immediately on single premium Pension (excluding PRSAs) and Investment Bond contracts. The fund is not available for regular premium business.

For more information on how the new GTR will appeal to your customers, speak to your Zurich Life Broker Consultant today or visit zurichlife.ie

David Walls

Head of Retail Investment Sales

Zurich Life
13 February 2015

* Source: Invesco, December 2014.

Warning: The value of your investment may go down as well as up.

Warning: If you invest in this product you may lose some or all of the money you invest.

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