

013-A

Amundi Funds - Polen Capital Global Growth

Global developed and emerging market large cap-biased growth-focused equities. Active bottom-up focused strategy with highly concentrated portfolio.



Über den Fonds

Daten zum May 30th 2026

Polen Capital is an employees majority-owned US-based global asset manager founded in 1979 by David Polen. Polen Capital specialises in delivering active, high-conviction, and competitively advantaged growth equity, and high yield credit strategies.

Amundi Asset Management is one of the distribution partners for Polen Capital's product offerings.

The **Amundi Funds - Polen Capital Global Growth Fund** is an actively managed fund seeking to achieve long-term growth by investing in global developed and emerging markets equities to build a concentrated portfolio of competitively advantaged businesses with potential for sustainable, above-average earnings growth. The fund adopts a business owner mindset for a long-term investment approach with low portfolio turnover to help preserve capital and provide stability across market cycles, and focuses on companies with high returns on capital, double-digit earnings growth, proven management teams, powerful products/services, and sound ESG practices.

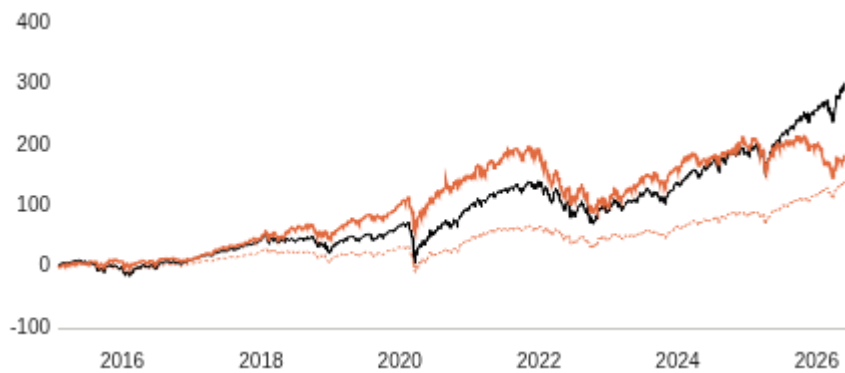
The fund has a highly concentrated portfolio of 25-35 holdings.

Amundi Funds - Polen Capital Global Growth

Anlagestil	Actively managed
Anlageklasse	<u>Global Equities - Growth</u>
Max. empfohlener Portfolioanteil	70%
ISIN	LU1691799990
Anteilkasse	I2 Acc USD
Ausschüttung	Thes
TER	1.01% p.a.
Nachhaltigkeit (SFDR)	Article 8

Wertentwicklung

Preisentwicklung – Maximaler Zeitraum



Bausteinrenditen

Amundi Funds - Polen Capital Global Growth

Ann. Rendite (3 J.):	6.63%
Ann. Rendite (5 J.):	0.77%
Ann. Rendite (10 J.):	9.90%
Ann. Standardabweichung (5 J.):	18.15%

This fund represents active exposure to global developed and emerging markets large caps-biased growth-focused equities.

Benchmark-Renditen

SPDR MSCI All Country World UCITS ETF

Ann. Rendite (3 J.):	22.50%
Ann. Rendite (5 J.):	11.44%
Ann. Rendite (10 J.):	12.76%
Ann. Standardabweichung (5 J.):	14.46%

[↗ Link zum Fonds-FairSheet](#)

FairHorizont-Benchmark-Renditen

Dimensional Funds PLC - World Allocation 80/20 Fund

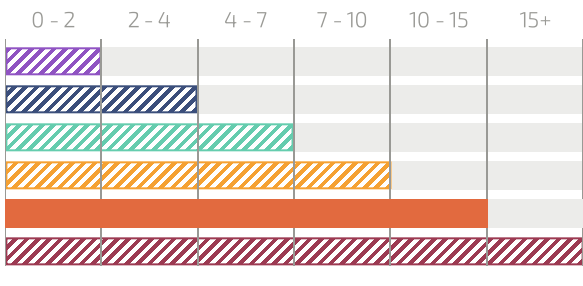
Ann. Rendite (3 J.):	17.21%
Ann. Rendite (5 J.):	8.23%
Ann. Rendite (10 J.):	—
Ann. Standardabweichung (5 J.):	12.49%

[↗ Link zum Fonds-FairSheet](#)

The **Dimensional World Allocation 80/20 Fund** is our **FAIRHORIZON Orange** reference benchmark solution that has 80% global developed equities and 20% global investment grade short-to-medium maturity bonds for global defensive equity-like returns and volatility.

Das FairHorizont-Konzept

Anlagezeithorizont in Jahren



Erwartete Langfristrendite	2 - 4% p.a.
Erwartete Volatilität	3 - 5% p.a.

Warum wir diesen Fonds bevorzugen

Relevance of strategy

This fund represents active exposure to global developed and emerging markets large caps-biased growth-focused equities.

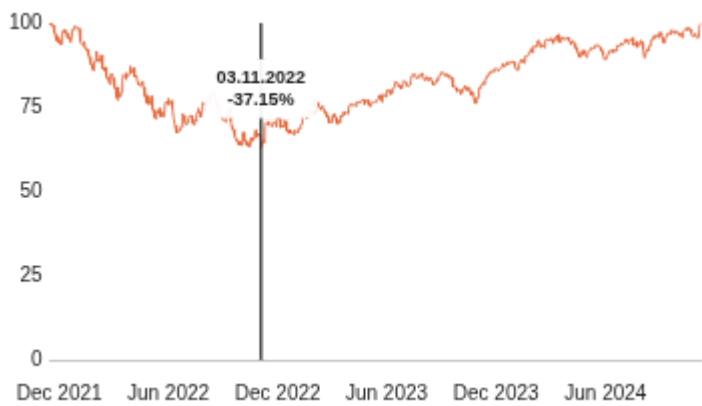
Manager expertise

Polen Capital is a boutique specialist in high conviction growth equity solutions.

Differentiated portfolio

The fund focuses on a bottom-up investment approach to build a concentrated portfolio of competitively advantaged businesses for long-term growth.

Historischer maximaler Drawdown & Erholungszeit



Max. Drawdown (seit Auflage) -37.15%
Erholungsperiode 735 Tage

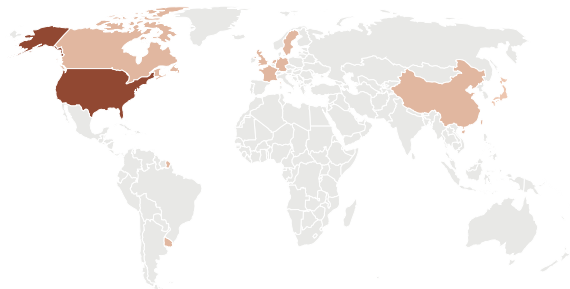
Diversifizierung



Top 10 Positionen



Sektoren



Geographie

CT 260410 CZK/USD AR Change	18.09%	Technology	32.07%	U.S.A.	63.29%
NVIDIA Corp	7.16%	Financials	20.03%	United Kingdom	4.65%
Alphabet Inc Class C Common Sh	6.04%	Communications	17.08%	China	4.25%
Mastercard Inc Class A Common	5.00%	Health Care	11.64%	Germany	4.21%
Visa Inc Class A Common Shares	4.99%	Consumer Discretionary	8.59%	Netherlands	4.11%
Broadcom Inc	4.97%	Cash	3.69%	Canada	4.06%
Microsoft Corp	4.95%	Industrials	2.96%	Cash	3.69%
Aon PLC	4.65%	Real Estate	2.30%	Taiwan	3.17%
Tencent Holdings Ltd	4.25%	Consumer Staples	2.02%	Uruguay	2.98%
Shopify Inc Class A Common Sha	4.06%			Sweden	2.50%
				France	2.02%
				Others	1.05%

Gefällt Ihnen dieser Fonds? Sprechen Sie mit uns!

Möchten Sie mehr über diese Investitionslösung oder über uns erfahren?



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MIT UNSEREM RESEARCH-TEAM SPRECHEN

