

027-A

Morgan Stanley Investment Funds - Global Opportunity Fund



Global developed and emerging market large cap-biased growth-focused equities with higher risk/return approach. Active bottom-up concentrated strategy.

Über den Fonds

Daten zum May 30th 2026

Morgan Stanley Investment Management (MSIM) is the asset management arm of US investment bank Morgan Stanley. MSIM manages over US\$1.9tn of assets globally through long-only, alternatives, and liquidity fund products.

The **Morgan Stanley Global Opportunity Fund** is an actively managed fund that seeks long-term capital appreciation. The fund emphasises a bottom-up stock selection process, by investing globally in high quality established and emerging companies that the investment team believes are undervalued at the time of purchase and have sustainable competitive advantages that can be monetised through growth. ESG considerations are integrated in the investment process. The fund runs a highly concentrated portfolio of ~35 holdings and can have high concentration in single sectors, resulting in potentially higher volatility than broad equity markets.

Morgan Stanley Investment Funds - Global Opportunity Fund

Anlagestil	Actively managed
Anlageklasse	<u>Global Equities - Growth</u>
Max. empfohlener Portfolioanteil	70%
ISIN	LU0834154790
Anteilklasse	I Acc USD
Ausschüttung	Thes
TER	0.94% p.a.
Nachhaltigkeit (SFDR)	Article 8

Wertentwicklung

Preisentwicklung – Maximaler Zeitraum



Bausteinrenditen

Morgan Stanley Investment Funds - Global Opportunity Fund

Ann. Rendite (3 J.):	21.11%
Ann. Rendite (5 J.):	4.94%
Ann. Rendite (10 J.):	14.66%
Ann. Standardabweichung (5 J.):	22.67%

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

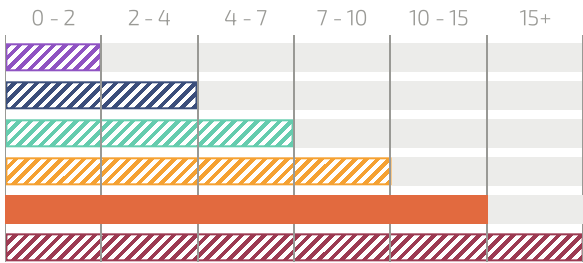
Ann. Rendite (3 J.):	17.21%
Ann. Rendite (5 J.):	8.23%
Ann. Rendite (10 J.):	—
Ann. Standardabweichung (5 J.):	12.49%

[↗ 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

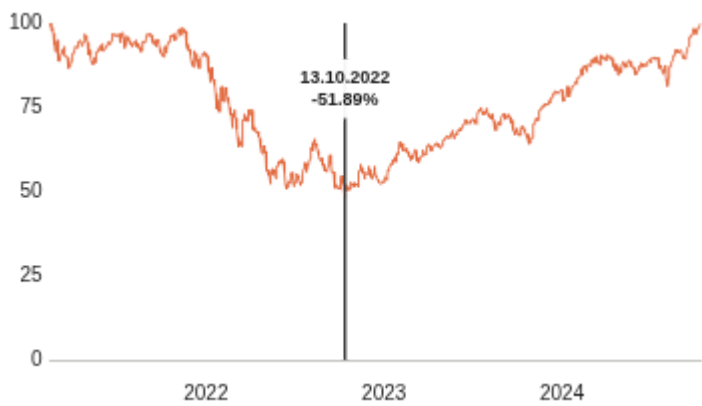
Relevance of strategy

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

Differentiated portfolio

The fund focuses on a bottom-up investment approach to look for undervalued companies with sustainable competitive advantages that can be monetised through growth.

Historischer maximaler Drawdown & Erholungszeit



Max. Drawdown (seit Auflage) -51.89%
Erholungsperiode 729 Tage

Diversifizierung



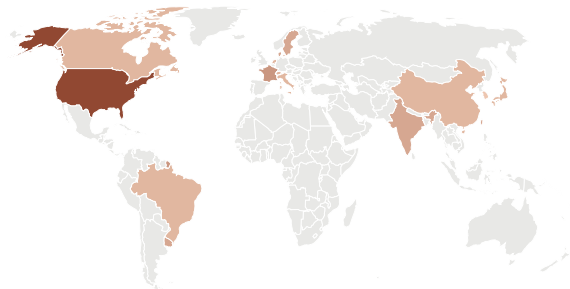
Top 10 Positionen

Meta Platforms Inc Class A	7.08%
Taiwan Semiconductor Manufactu	6.18%
Uber Technologies Inc	5.80%
DoorDash Inc Class A	5.60%
DSV A/S	4.84%
MercadoLibre Inc	4.53%
Spotify Technology SA Ordinary	4.49%
Schneider Electric SE	4.45%
Amazon.com Inc	3.02%
Visa Inc Class A Common Shares	3.01%



Sektoren

Communications	31.97%
Consumer Discretionary	24.18%
Financials	16.15%
Technology	14.80%
Industrials	10.79%
Cash	1.74%
Treasury	0.58%



Geographie

U.S.A.	44.02%
France	9.72%
Taiwan	6.18%
India	5.71%
Denmark	4.84%
Uruguay	4.53%
Sweden	4.49%
Singapore	3.01%
Netherlands	2.77%
Italy	2.76%
Brazil	2.56%
Others	9.41%

Gefällt Ihnen dieser Fonds? Sprechen Sie mit uns!

Möchten Sie mehr über diese Investitionslösung oder über uns erfahren?

MIT UNSEREM RESEARCH-TEAM SPRECHEN



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