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FLEXIBLE, LOW DURATION SOLUTION TO NAVIGATE EUROPEAN FIXED INCOME MARKETS

Recommended
minimum investment
horizon:

2 YEARS



SFDR Fund Classification**:

Article 8

Carmignac Sécurité is a fixed income UCITS fund invested in bonds and other debt securities denominated in Euro. Its active, flexible and low duration approach enables the Fund to implement conviction-driven strategies mainly on European markets with no bias to any benchmark. It aims to outperform its reference indicator⁽¹⁾ over a recommended investment period of two years.

KEY POINTS



Low duration Euro Fixed Income Fund with limited exposure to credit risk with a minimum average rating of investment grade.



Conviction-driven, non-benchmarked philosophy: portfolio construction is a result of Fund manager views and market analysis with no bias to any benchmark.



Flexible and active approach: active management of modified duration (**from -3 to +4**) is implemented to exploit opportunities across markets.



A disciplined risk management integrated into the investment process, including both financial and extra-financial criteria.

OUR MACRO THEMES ARE TRANSLATED INTO INVESTMENT STRATEGIES

TOP-DOWN FRAMEWORK

Establishing macro scenario and identifying key themes

Continuous interactions of equity, fixed income and cross asset experts

BOTTOM-UP STRATEGIES

Identifying individual strategies and names

Rigorous research carried out by sector-specific analysts

PORTFOLIO CONSTRUCTION

Selecting performance drivers and optimising risk levels

Portfolio manager flexibly manages duration and monitors positions

COMBINE ALL EXPERTISE

