

# CT (Lux) Global Smaller Companies

## At a glance

A small cap global equity fund that invests in quality companies with durable competitive advantages and the ability to generate strong and sustainable returns.

## Investment objective & policy

To provide long-term capital growth and outperform the MSCI World Small Cap Index by investing in a well-diversified and high conviction portfolio of global smaller companies.

In line with its active management strategy, portfolio holdings may deviate significantly from those of the index while there is also the flexibility to invest in off-benchmark companies.

## Risks

This fund is suitable for investors who can tolerate high levels of risk and volatility and have a long-term investment horizon. Investors could lose some or all their capital and should read the Prospectus for a full description of all risks.

**Investment risks:** Investment in equities, smaller companies and currencies.

“The global smaller companies universe provides active investors with an enormous opportunity set. By focusing on businesses with truly sustainable, competitive advantages, our strategy has the potential to capitalise on long-term growth trends.” – **Scott Woods**

## Key facts

**Fund inception date:** 3 March 2011

**Typical fund holdings:** 70-90 companies

**Fund size:** €2.0 billion (as at 31.12.2024)

**SFDR:** Article 8\*



**Scott Woods**

Portfolio Manager  
(since April 2019)

## Key reasons to invest

- 1 Focus on quality small cap companies with durable competitive advantages.
- 2 Draws on best ideas from regional small cap teams.
- 3 High-conviction 70-90 stock portfolio unconstrained by sector and region.

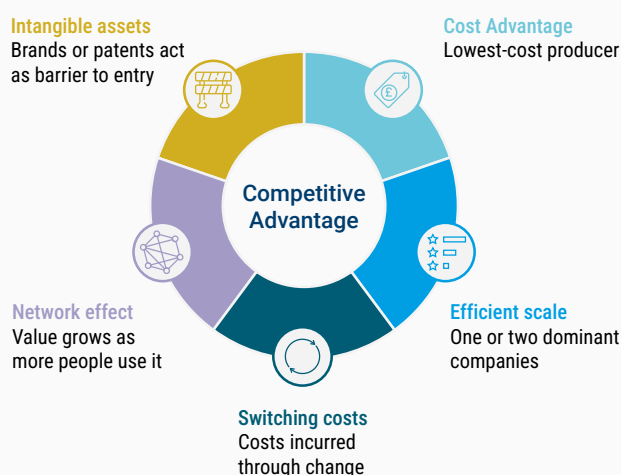
\*The fund promotes environmental or social characteristics under Article 8 of the EU Regulation 2019/2088 on sustainability-related disclosures in the financial services sector (SFDR). The decision to invest in the promoted fund should also take into account all the characteristics or objectives of the promoted fund as described in its prospectus. The fund's sustainability related disclosures can be found on our website [columbiathreadneedle.com](https://www.columbiathreadneedle.com).

# Investment approach

The ability of quality companies to sustain high returns on capital and above-average growth is often underestimated, meaning that potential long-term winners trade at a discount to their intrinsic value. We search for quality stocks which have durable competitive advantages alongside robust business models, and therefore strong and sustainable long-term growth potential. The global equities team thoroughly analyses both company fundamentals and industry prospects. We use a research framework to identify the source and durability of companies' competitive advantages with Environmental, Social and Governance (ESG) analysis central to this approach.

We work closely with our regional small cap equity teams, global central research and responsible investment teams across the globe to build a high conviction, best ideas portfolio of some of the world's best quality companies. We are not simply looking for companies with the highest returns, but also ones where they are either stable or improving and are sustainable. As we take a 'go anywhere' approach, stock selection drives sector and regional weightings, and we believe our focus on businesses with strong fundamentals drives outperformance across a range of market conditions.

## How we identify a company's edge



### Competitive advantage

- Focus on understanding source and sustainability
- Established and / or improving
- All holdings will display one or more

### ESG

- Integrated into research process
- Determinant of company quality
- Measure of risk / Informs opportunity
- Active engagement



To find out more visit [columbiathreadneedle.com](https://columbiathreadneedle.com)



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These documents are available in Switzerland from the Swiss Paying Agent CACEIS Investor Services Bank S.A., Esch-sur-Alzette, Zurich Branch, Bleicherweg 7, CH 8027 Zurich.

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