

Consistency Through Change

J O Hambro Capital Management Celebrates 10 Years Of JOHCM Global Opportunities Strategy

The JOHCM Global Opportunities Fund aims to provide investors with a return profile that captures much of the upside but with materially lower volatility than either the index or comparable global equity funds.

The fund has been managed by Ben Leyland and Robert Lancaster since inception on 29th June 2012. They are both disciplined and focused stock-pickers who work to a simple principle: that good companies will survive and thrive through multiple cycles if they have sustainable competitive advantages, and investors will enjoy outstanding returns if they invest in such companies whilst remaining disciplined around balance sheet and valuation risks.

Since inception, the Fund has delivered exceptional performance, generating an average annual return of 12.86%, compared to 12.45% for the benchmark, putting it into the first quartile of its peer group for the period. Over the past 12 months, the Fund's returns are second in its sector.

The strategy has amassed an AUM of £2.8 billion.

TJ Voskamp, Head of Distribution Europe, UK and Asia, said: "In a period when many funds fail to last more than a few years, it's a testament to the differentiated approach of Ben and Rob within the Global Opportunities Fund that it has delivered for clients for a decade. It's more pleasing still that their highly differentiated performance profile is now more relevant than ever with clients given its strong recent performance."

Commenting on the anniversary Ben and Rob said: "We are very pleased to reach this milestone and are grateful to the clients who have supported us over this time. It's great to know that our tried and tested process remains in demand and that recent market conditions have served to remind people of the benefits of investing with patience and discipline in high quality companies with durable franchises."

To learn more about the JOHCM Global Opportunities Fund and to hear from Ben Leyland and Rob Lancaster on their thoughts of running the fund for a decade click [here](#).

Data as at 31 May 2022; performance source J O Hambro; sector source IA; volatility since inception is 11.35% for the fund and 13.90 for the benchmark, expressed as standard deviation of the annualized total return expressed as a percentage.*

ENDS

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Return history

	1m	3m	1yr	3yr	5yr	Since inception	Annualised
A GBP Class	0.12	8.35	15.22	31.55	47.64	232.37	12.86
Benchmark*	-1.88	0.83	5.63	39.17	57.57	220.60	12.45
Quartile**	2	1	1	2	2	1	

Discrete 12 month performance A GBP share class to:

31 May 2022	31 May 2021	31 May 2020	31 May 2019	31 May 2018
15.22	12.29	1.68	10.63	1.45

*** MSCI AC World NR (12pm adjusted)**

**** Sector quartile ranking: IA Global, and Lipper Global Equity Global domiciled in the UK, offshore Ireland or offshore Luxembourg**

Past performance is no guarantee of future performance

NOTES TO EDITORS:

Ben Leyland biography

21 years' industry experience, joined JOHCM in Apr 2006.

Ben has been with JOHCM since April 2006, when he joined to work with John Wood on the UK Opportunities Strategy, latterly as a Fund Manager. He was previously at Schroder Investment Management as a Financial Analyst in their Pan-European equity research

department. Ben is a CFA Charterholder and holds a MA (Hons) in History from the University of Cambridge. He was voted one of Financial News's '40 under 40' Rising Stars in Asset Management, 2015.

Rob Lancaster biography

14 years' industry experience, joined JOHCM in Feb 2012.

Prior to joining JOHCM, Robert worked for Orbis Investment Advisory as an equity analyst for the Orbis Global Equity Strategy, focused on the retail, media, technology, oil & gas and insurance sectors. Previously, Robert worked as a Maths and Physics Teacher at Wellington College. Robert holds a BEng and MEng from Cambridge University and is a CFA Charterholder.

About J O Hambro Capital Management Limited

J O Hambro Capital Management Limited (JOHCM) is a UK-headquartered active asset management company with an investment performance-led culture. It manages £28.9 billion of assets (as at 31st March 22) across UK, European, Asian, Japanese, Global/International and Emerging Markets equities and multi-asset strategies. JOHCM constrains investment strategy capacity in order to promote market-leading portfolio performance.

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