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Launch of Regnan Global Mobility and Logistics Fund

Regnan, the specialist sustainable and impact investing brand of J O Hambro Capital Management (JOHCM), announces the launch of Regnan Global Mobility and Logistics Fund, an Irish domiciled OEIC. The fund will be managed by Bertrand Lecourt and Saurabh Sharma as part of the growing thematic range that includes the successful Regnan Water and Waste Fund, launched in September 2021.

The aim of the Fund is to generate capital growth over rolling 5-year periods by investing in a diversified portfolio of companies in the mobility and logistics universe, from original equipment manufacturers to components, systems, distributors, infrastructure and related-technology. Peers in this space place a narrow focus on alternative fuels and automation but this fund will invest across the mobility and logistics value chain, targeting the changing shape of global supply chains, the modernisation of transport infrastructure, the transition to new fuels and to innovations improving efficiencies in moving goods and people.

Mobility and logistics are perpetual themes in social and economic life. We believe the Regnan Global Mobility and Logistics Fund presents a significant investment opportunity within the theme. The fund will take a bottom-up approach, seeking above-market growth prospects while remaining focused on revenue, earnings, cash flow and balance sheets to construct a portfolio of 35—50 stocks. The fund will offer investors a distinctive return profile drawn from ‘real world’ sectors.

Bertrand Lecourt, Head of Thematic Investments Strategies, said: “I am proud and excited to launch the Regnan Global Mobility and Logistics Fund with Saurabh alongside the highly experienced and dynamic Regnan sustainable team, especially after our success with the Regnan Water and Waste Fund over the past two years. Our focus is to deliver compelling returns by investing in companies with sustainable business models, high quality management, strong balance sheets and with histories of cash generation within the mobility and logistics universe.”

Background on Regnan

Regnan exists to drive positive impact and investment for a sustainable future and works towards this by developing and promoting more principled, rigorous and outcome-oriented approaches in responsible investment. It has a long and proud heritage in engagement and advice on environmental, social and governance issues.

Regnan has produced pioneering research that has changed the way investors think about their wider responsibilities to society including advising influential organisations, such as the Principles for Responsible Investment (PRI).

Regnan can trace its roots back to a collaboration with Monash University, Melbourne in 1996. Since then Regnan has taken its ESG expertise globally. Its diverse experience in advocacy, regulation, academia and advising investment managers has enabled Regnan to offer ESG-related advisory, engagement and research services.

Team biographies

Bertrand Lecourt - Senior Fund Manager, Head of Thematic Investments Strategies

Bertrand leads the Thematic Investing strategy at Regnan. He is Senior Fund Manager on the Regnan Sustainable Water and Waste strategy. Previously he was a Portfolio Manager at Fidelity International, where he launched and managed the Fidelity Funds - Sustainable Water & Waste Fund. Prior to joining Fidelity International in 2018 Bertrand was a Portfolio Manager at Polar Capital and the founder and CIO of Aquilys Investment Management. Before moving to the buy-side, Bertrand was Head of Equity Research, France at Deutsche Bank and a utilities analyst at Dresdner Kleinwort Benson and Goldman Sachs. He holds an MSc in International Finance from HEC School of Management, France, an MSc in Money, Banking and Finance from Birmingham University, UK, and a DEA in Monetary Economics from Orleans University, France.

Saurabh Sharma, CFA, CAIA - Fund Manager

Saurabh is part of the Thematic Investing strategy at Regnan. He is a Fund Manager on the Regnan Sustainable Water and Waste strategy. Previously, he was an Assistant Portfolio Manager on the Fidelity Sustainable Water & Waste strategy and an Investment Director in Fidelity's equity team. Prior to joining Fidelity in 2014, he worked as an equity research analyst for Moody's Analytics (erst Copal Amba) from 2011 to 2014 and for Global Data from 2010 to 2011. He has an MBA in Finance from IBS, Hyderabad, India, and holds a CFA (ICFAI) degree. In addition, he is a CFA and CAIA charter holder.

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For further information, please contact:

Jessica Riley / Wendy Watherston Teamspirit

JRiley@teamspirit.co.uk / WWatherston@teamspirit.co.uk

Tel: 020 7360 7878

NOTES TO EDITORS:

J O Hambro Capital Management Limited

J O Hambro Capital Management (JOHCM) is an active investment management company regulated by the UK's Financial Conduct Authority (FCA). From our offices in London, Singapore, New York, Boston, Philadelphia, Dublin, Paris and Munich, we manage £21.5 billion (as at 30 September 2023) of assets across a range of global and regional equity strategies. Our nimble teams invest with high conviction and full autonomy, able to pursue the best investment opportunities whilst being free from the bureaucratic distractions of larger investment houses.

Our Parent Company – Perpetual Limited

In 2023, Perpetual Limited – an ASX-listed, global diversified financial services company headquartered in Sydney, Australia – acquired Pental Group Limited, including J O Hambro Capital Management, to create a global leader in multi-boutique asset management with autonomous, world-class investment capabilities and a growing leadership position in ESG. “Regnan” is a registered trademark of Pental Group Limited.

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