

# GENERATION<sup>+</sup> FUNDS



## GENERATION GLOBAL VALUE PRIVATE TRUST

### Top Five Reasons to Invest

# Top Five Reasons to Invest in the Generation Global Value Private Trust



## 1 VALUE APPROACH

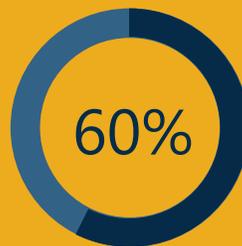
We're value investors, seeking undervalued high quality businesses. We prefer companies with strong competitive advantages led by management teams incentivized to maximize return on capital. Our fundamental analysis provides conviction to hold 30-40 holdings that meet our criteria.

## 2 DISCIPLINED PROCESS

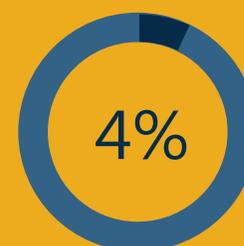
Utilizing our proprietary screening and ranking technology, we systematically monitor over 1,200 securities globally. Our process is designed to find the most undervalued high quality large cap stocks in the world. Innovative trading models are used in an attempt to optimize the timing of our purchases and sales.

## 3 GLOBAL UNIVERSE

Did you know that Canada and the U.S. make up only 55% of global market capitalization? Going global opens up the other 45% of the world. That means more opportunities and exposure to different economies and sectors.



Portion of Canadian equity portfolios comprised of Canadian equities<sup>1</sup>



Canada's weight in global market cap

## 4 ECONOMIC RISK MONITORING

We monitor the business cycle with our proprietary Economic Composite. Since 1965, two-year rolling losses of 20% or more have always been preceded by a business cycle peak. When our Economic Composite alerts us to the potential for a recession in a particular country we may reduce exposure or hedge the portfolio via equity index ETFs or option strategies.

## 5 MARKET RISK MONITORING

Our Market Risk Monitor, based on an algorithm we have developed that combines market volatility and momentum, also alerts us to potentially significant market drawdowns. When the Monitor alerts us to potential market risk in a country, we may reduce our exposure to that market or hedge the portfolio via equity index ETFs or option strategies.

<sup>1</sup>Source: Vanguard

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