



US mutual fund awarded five-star rating by Morningstar

California - Luxembourg June 17, 2021. The Scharf Global Opportunity US mutual Fund (WRLDX), which employs the same underlying process as the UCITS OYSTER US Value Fund, has been awarded a five-star ‘overall’ rating by Morningstar over both three-and-five-year time periods.

The Scharf Global Opportunity strategy was placed in the first percentile versus its peers over three-year and five-year time periods as of May 31. The strategy was launched on October 14, 2014, with the same unique, disciplined and repeatable investment process and philosophy as the OYSTER US Value Fund, but with the latter primarily focused on US-listed opportunities.

As part of iM Global Partner’s partnership with Scharf, the OYSTER US Value Fund was subsequently launched in 2020 to bring the highly regarded strategy to European investors.

All strategies construct portfolios of 25 to 40 quality companies seeking to offer significant margin of safety with large valuation discounts to intrinsic values, high earnings predictability, and solid growth.

The concentrated portfolios seek to deliver outstanding long-term risk-adjusted returns through a value-focused, fundamental, and bottom-up approach. The exceptional track record of Global Opportunities reflects the investment team’s capacity to combine quality and valuation criteria, while differentiating all of the strategies from the traditional value approach.

Brian Krawez, President of Scharf Investments, said: “It is gratifying to see the Scharf Global Opportunity Fund recognized by Morningstar for its long-term performance. At Scharf, we remain focused on a high-quality value approach in each of our four strategies, and this, coupled with our long-term perspective and high conviction portfolios, allows us to offer unique value to our investors.”

Philippe UZAN, CIO Global Asset Management of iM Global Partner said: “We pay extreme attention to the quality and consistency of the different portfolio strategies developed by the investment managers we have selected for the OYSTER fund range. The top positioning of WRLDX in Morningstar US funds World Large-Stock Value category is one extra confirmation of the very high added value we can expect from Scharf Investments as the sub-manager of OYSTER US Value”

About Scharf Investments

Scharf Investments is a California-based investment firm founded in 1983. The firm has been managing portfolios for nearly four decades to increase capital during periods of strong growth while preserving it during significant market downturns. Scharf Investments has \$3.8 billion of assets under management as at June 2021.

www.scharfinvestments.com

About iM Global Partner

iM Global Partner is a worldwide asset management network. It selects and builds long-term partnerships with talented and independent asset management companies through direct capital ownership. iM Global Partner is present in 16 locations across Europe and the United States and provides its clients with access to the best management strategies of its Partners. iM Global Partner represents over US\$26 billion of assets under management as of June 2021.

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