

Espira Global Innovation

An actively managed global equity fund that invests in innovation-driven companies whose products and services not only shape the modern world, but also drive its future. Our investment strategy is based on the belief that sales growth is the primary driver of long-term returns and that innovative companies not only grow faster but are also significantly more resilient.

A new era of technology-led development

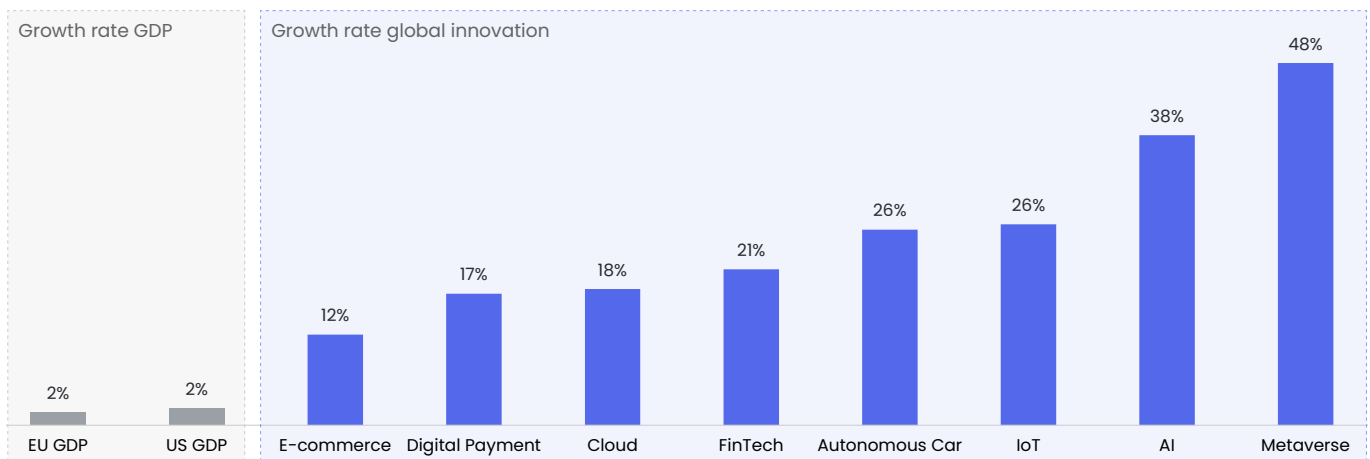
We are at the forefront of a new cycle of innovation, where breakthroughs in areas such as artificial intelligence and chips for advanced computing will accelerate development exponentially. As the technology matures, technological advances will spill over from the IT sector to the wider economy. Over the next decade, hundreds of millions of jobs are expected to be automated, healthcare will be transformed with new computer-generated and personalised medicines, factories will be autonomously controlled and we will see the first truly self-driving cars. This new cycle of innovation is expected to be the fastest in history, creating great opportunities for companies that are early adapters and adopt the new technology.

Espira Global Innovation gives investors access to the high-quality companies that are leading this development and the financial opportunities it creates. Our experienced portfolio management team actively selects portfolio companies for long-term financial growth.

Fund benefits

- › Global Equity Exposure
- › Investments supported by strong trends in innovation
- › Actively selected companies with reasonable valuations in relation to long-term potential
- › Focus on quality companies and portfolio balance
- › Experienced management team

Expected annual growth rate until 2029/30

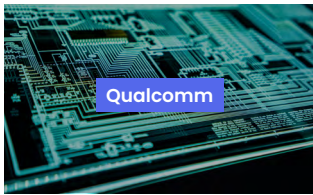


Innovation at a reasonable price

Espiria Global Innovation offers investors global equity exposure with investments supported by long-term innovation trends

- › We invest in leading companies across industries and geographies that are shaping our future through innovation
- › We actively select companies that trade at reasonable valuations relative to their future potential
- › The portfolio consists of 45–55 global companies, with a focus on quality and portfolio balance

Some of the innovation-driven companies in our current portfolio



Qualcomm, whose chips are leaders in wireless communication and AI for connected devices, **Trimble**, which makes the physical world digital, **Siemens Healthineers**, which combines AI with its equipment for medical imaging and cancer treatment, and **Novo Nordisk**, which is a world leader in obesity medicine.

Fund information

Fund name	Espiria Global Innovation
Inception date	2013-05-31 (A SEK)
ISIN	LU0901111830 (A SEK)
Domicile	Luxembourg
Fund type	UCITS, daily traded
Sustainability	SFDR Article 8

Investment team



Peter van Berlekom

Portfolio Manager & CIO
Espiria since 2020, in the industry since 1990



Jakob Wikander

Portfolio Manager
Espiria since 2020, in the industry since 2009



Huizi Zeng

Portfolio Manager
Espiria since 2021, in the industry since 2008



Stefan Pari

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Espiria since 2014, in the industry since 2007



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Espiria since 2023, in the industry since 2022

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