

# PERFORMANCE EQUITY STRATEGY

## STRATEGY FACTS

**Fund administrator:**  
Irish Life

**Base Currency:**  
Euro

**Geography of Investment:**  
Global

**Management Style:**  
Passive

**Key Points:**

This strategy is a high risk strategy available on **CONNECT**, which aims to achieve high long-term returns by investing in global equity markets.

### Strategy Objective

Provide high long-term returns by passively investing in a range of equities. Some of the underlying Funds use an ESG (Environmental, Social and Governance) methodology in their investment approach.

This is a high risk strategy which can have a high level of volatility. It is most suitable for long term investment or for members with a high risk tolerance. It is also suitable for members who want to take more investment risk over their savings career in order to seek higher returns.

### Top 5 Equity Holding

Stock	Fund %
Apple	3.1
Microsoft	2.2
Alphabet	1.4
Lvmh Moet Hennessy Louis Vuitton Se	1.2
ASML	1.1

### Investment Performance

	Q3 2022	1 Year	3 Years (p.a.)	5 Years (p.a.)
Fund*	-1.7%	-8.3%	4.9%	6.2%

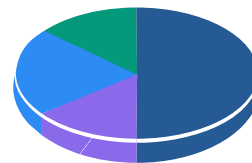
Inception Date 31/03/13

The **Performance Equity Strategy** gross return for the quarter was -1.7%.

Global equity markets fell in Q3, with market conditions highly volatile over the quarter. Inflation and interest rates continued to rise alongside increased recessionary risk which resulted in a challenging environment for both investors and policy makers.

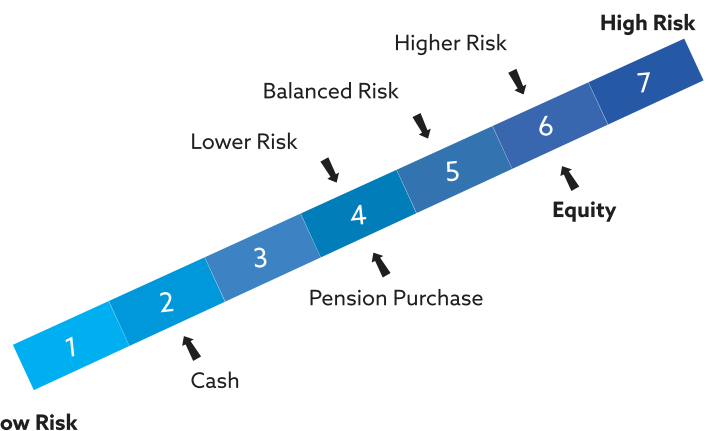
Markets had recovered strongly in July (after the sharp losses seen in the first six months of 2022), but the mood soured for the remainder of the quarter, particularly in September, over higher than anticipated interest rate rises.

### Equity Allocation



Sustainable Equity (Developed Market)	50%
Eurozone	20%
Low Volatility (incl. ESG factor)	15%
Sustainable Equity (Emerging Market)	15%

### Comparative Risk



### Underlying Managers



**Important information**

\*Returns shown are gross of annual charges. The value of investments may go down as well as up and the return of your investment is not guaranteed. Fluctuations in financial markets, currencies and other risks may cause fluctuations in the value of investments. Any fund objective or target should not be considered as a guarantee of performance of any fund. Derivatives may also be used for efficient portfolio management purpose.

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