

# Phoenix Fund

## Foreign Exchange and Commodities

SANKTUARY  
INVESTMENTS

### Investment Objective

The fund aims to generate above market returns through capital growth over the medium to long term. This will be achieved by investing in global currency pairs of G7 countries to ensure maximum liquidity, alongside commodities within the precious metals and energy markets.

We believe successful investing arises from high portfolio diversification to effectively manage risk, coupled with active management of a professional team.

### Investor Profile

This fund is ideally suited to investors :

- looking to diversify an existing portfolio to gain exposure within the FX and commodity asset classes globally.
- seeking long term above inflation capital appreciation
- operate with a medium to long time horizon and a medium to high risk profile, due to the volatility that might be witnessed in the short term.

### Fund Activity

- The changes in economic conditions within the UK and Europe caused by Brexit negotiations continues to present both short and long term opportunities in the currency markets. With these negotiations still taking place, being able to enter both long and short positions should prove favourable to investors.
- The glut in supply within global energy markets remains a long term global talking point. No overnight solution is likely to be found in the near term due to the incentives different parties holds alongside the difference in production costs that exist around the world. Positions on both the long and short side enable investors to capitalise on movements in either market direction, without purely adopting a 'buy and hold' strategy.

### Performance



## Key facts

### General Information

#### Fund Manager

Christian Evans

#### Fund Launch Date

01 Aug 2016

#### Benchmark

Various

#### Strategy

Long/Short

#### Minimum Investment

£2500 lump sum/£250 monthly savings

#### Investment Horizon

3 Years Plus

#### Management Fee

0%

#### Performance Fee

30% HWM

### Contact

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or speak to your financial adviser.