

COURSE DETAILS

COURSE NAME	MFS Global Equity Fund Money Masters
COURSE TYPE	Money Masters
EXPERT	Roger Morley, Victoria Higley
CPD KNOWLEDGE AREA	009959
PROFESSIONAL DIMENSIONS	Capability
FPA ACCREDITATION NUMBER	Managed Investments

HOW TO USE THIS DOCUMENT

Thanks for downloading your No More Practice course. This document provides you with all the content you need to create the course in your LMS. Overleaf you'll find the following sections:

- Text to upload to your LMS for each course section and the accreditation test. Note that this is provided in the structure in which the course is intended to be delivered.
- Vimeo bulk download link for all videos and images needed for the course. If you are unable to download from Vimeo, please contact your client relationship manager on (02) 8969 6077 and we will arrange an alternative.

To ensure you have the best experience with your No More Practice Education, we recommend you follow the following steps:

- Ensure this course/fund is applicable and appropriate for your licensee needs and/or approved product list.
- Copy and paste the supporting text from Section 1 overleaf alongside the course within your learning management system (LMS).
- Download all videos from the provided Vimeo portfolio and upload to your LMS.
- Download any supporting documents that are provided alongside the course and place alongside the course in your LMS. These can include tables, graphs, fact sheets or product disclosure statements.
- Utilise the CPD accreditation details above to finalise the course in your LMS.
- Communicate to your planner network that the new course is live.

SECTION 1 – COURSE TEXT

1. COURSE INTRODUCTION:

The MFS Global Equity Trust *Money Masters* course with Roger Morley and Victoria Higley will give you insights into:

- The benefits of a truly long-term investment horizon
- How MFS uses co-portfolio managers to make better investment decisions
- How a sector agnostic philosophy can help find value globally
- The way MFS uses in-depth research to minimize volatility

2. SNAPSHOT

The MFS Global Equity Trust uses a unique management style with the aim to outperform the MSCI World Index and present growth at reasonable prices. The trust's truly long-term investment horizon and the investment analysts it has positioned globally result in a unique strategy which attracts long-term investors seeking lower volatility over a market cycle.

3. OVERVIEW

3.1 Trust Philosophy

Long-term investing, in-depth research and selecting quality companies lie at the heart of the MFS Global Equity Trust. The trust draws from the almost 100-year history of MFS and their experience from managing assets of over 600 billion Australian dollars.

3.2 Competitive Advantage

Not only does MFS stand out from the crowd by virtue of the quality of its research platform, but also how it manages people. With feet on the ground globally, the analyst teams work together to provide a full, long-term picture of what could go right and what could go wrong with any stock.

3.3 The Team

Instead of having just one portfolio manager, the MFS Global Equity Trust has two co-managers who are required to make a joint decision over any investment. Low staff turnover has resulted in investment teams with long industry experience who work together from across the globe.

4. BEST SUITED FOR:

4.1 Key Considerations for Investors

The MFS Global Equity Trust has a truly long-term investment horizon and is best suited for investors who also believe in investing for the long run and may be seeking less volatility over the duration. The trust uses experience and research to minimise downside risk so that they win in the long-term by not losing.

5. STRUCTURE AND OBJECTIVES:

5.1 Unique Aspects of the Trust

The MFS Global Equity Trust is sector agnostic and invests in stocks instead of markets. It remains fully invested while looking for companies which present high returns and compounding earnings.

5.2 Buy and Sell Discipline

The team runs two portfolios in parallel, one diversified and one more concentrated. Their careful buy discipline results in a style of growth at a reasonable price, while the sell discipline removes stocks that become too expensive or haven't worked out. The trusts are available on most major Australian platforms.

SECTION 2 – TEST YOURSELF

Q1:

The MFS Global Equity Trust seeks to out-perform the MSCI World Index excluding which stocks?

- a. Gasoline
- b. Gambling
- c. Tobacco (**correct**)
- d. Alcohol

Q2:

What fees are attached to the MFS Global Equity Trust?

- a. 0.11%
- b. 0.33%
- c. 0.55%
- d. 0.77% (**correct**)

Q3:

Which sectors does the trust focus on?

- a. Infrastructure
- b. Technology
- c. FMCG
- d. The trust is sector agnostic (**correct**)

Q4:

How many stocks are allowed in the concentrated portfolio?

- a. 20
- b. 25 (**correct**)
- c. 30
- d. 35

Q5:

How long is the average holding period for the MFS Global Equity Trust's assets?

- a. 1 year
- b. 3 years
- c. 5 years
- d. 8 years (**correct**)

VIDEO ASSETS DOWNLOAD LINKS

You can download all the videos for your course via one of the following links:

Vimeo: <https://vimeopro.com/evolutionmediagroup/mfs-money-masters-global-equity-trust>

Password: MFS18

Dropbox:
