

## Insync Funds Management

Insync is an award-winning, independent high conviction investment manager that focuses on uncovering the highest quality businesses best positioned to benefit from global megatrends.



### Monik Kotecha Portfolio Manager

BSc (Hons), MSc  
34 years of funds management experience across international and Australian equity markets.  
Previously senior portfolio manager at Bankers Trust & IML with experience working from London, New York & Sydney.

### Investment Approach

By capitalizing on structural shifts in technology, demographics, and sustainability, the fund provides a balanced exposure to a diverse range of transformative drivers. Each company is rigorously evaluated to ensure it meets strict criteria, allowing for greater potential impact from every investment.

### Risk Management

The concentrated portfolio is designed to balance diversification and focus, reducing reliance on any single trend while mitigating sector-specific volatility through thoughtful allocation and process discipline.

### Quality

Our portfolio is built around businesses with sustainable competitive advantages, managed by trustworthy leaders, and priced to deliver superior long-term returns.

### Agility

Being small and nimble allows Insync to make quick and efficient decisions, enabling us to capitalize on opportunities and navigate challenges with precision.

### Independence

Independence empowers Insync to align fully with client interests, prioritizing long-term wealth creation over short-term corporate pressures, while enabling swift, disciplined decision-making in dynamic markets.

## Fund Overview

The Insync Global Quality Equity Fund is a high-conviction, concentrated portfolio purpose-built to **harness growth from transformative global mega-trends** spanning both technology and non-technology sectors.

Our focused approach targets companies with **exceptional quality, growth potential, and resilience**, enabling sustainable capital growth through economic shifts.

## Fund Objective

The fund aims to outperform global equity indices over the long term, delivering **consistent, sustainable growth** driven by the world's most impactful megatrends.

## How to invest

Please visit our website [here](#) for further information or call 02 8094 1255.

## Key Information

Benchmark	MSCI ACWI (ex AUS) NTR (AUD)
Recommended Investment Period	5 - 7 Years
Number of Holdings	20 - 40
Management Fee	0.98% p.a.
Buy / Sell Spread	+0.20% / -0.20%
Frequency of Distributions	Annually
APIR Code	ETL5510AU
Application / Redemption Frequency	Daily
Inception Date	October 2009

\* Management fee is inclusive of GST



### Investment Enquiries

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### Investor Services

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