

Goodbody Asset Management

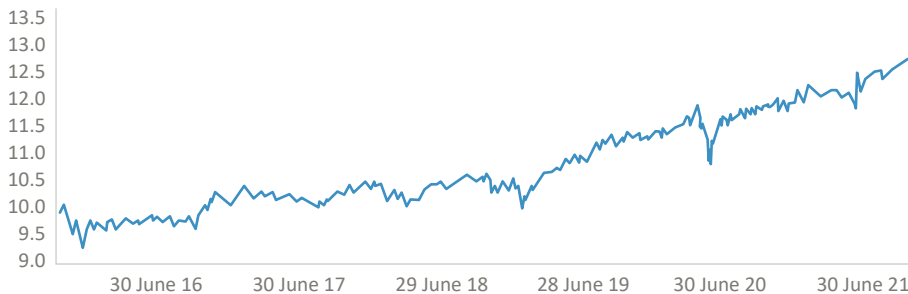
Goodbody Dividend Income Cautious Fund - **GDI 3**

- Dividend equities drive Fund performance in June
- Gold declines as risk appetite stays strong

Fund performance

The Fund delivered a solid return in June. Top performing dividend equity holdings during the month included ResMed, the medical equipment company (+22%), S&P Global (+12%) and Dollar General (+10%) the US discount retailer. A large product recall by a key competitor to repair/replace 3-4m sleep apnoea and ventilator machines was viewed as a positive market share opportunity for ResMed which saw earnings upgrades during the month. The Fund's bond holdings were essentially flat and unchanged in June. Gold declined 4%, while the Fund's downside risk management strategy (index put options) was also a drag given the backdrop of rising equity markets.

Fund price since inception



Share Class B (€)										
1 MTH	3 MTH	YTD	1 YR	3 YR p.a.	2020	2019	2018	2017	2016	Since inception
2.2%	3.1%	4.9%	7.5%	6.9%	5.7%	11.8%	-1.4%	1.8%	1.5%	27.0%

Source: Goodbody

Why consider the Goodbody Dividend Income Cautious Fund?

1. Income Oriented Multi Asset Exposure

The Fund invests in high quality dividend paying equities which act as the engine of real returns for investors. Other assets, such as cash, fixed income and exchange traded funds are used to provide diversification and reduce volatility.

2. Active asset allocation

The Investment Team employs an asset allocation framework to tactically adjust exposure to equities throughout the investment cycle.

3. Risk management strategy

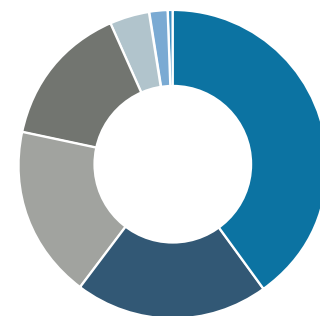
This strategy helps to reduce volatility and smooth the returns journey for investors.

The **Goodbody Dividend Income Cautious Fund** is a risk managed multi-asset fund which invests in high quality dividend paying stocks as well as income generating Bonds, REITS, Alternatives and Cash.

Key information

<b>Fund launch date</b>	18 December 2015
<b>Fund type</b>	UCITS
<b>Base currency</b>	€
<b>Pricing/Dealing</b>	Daily
<b>Share class</b>	B
<b>ISIN</b>	IE00BYWKP775
<b>Month end NAV (€)</b>	12.70
<b>Investment management fee</b>	0.50%

Asset Split as at 30 June 2021



■ Equity	40%
■ Cash	20%
■ Government Bonds	18%
■ Corporate Bonds	15%
■ Property	4%
■ Gold	2%
■ Put Options	0.4%

Source: Goodbody

**Warning: Past performance is not a reliable guide to future performance.**

Risk rating **1** 2 3 **4** 5 6 7

## Equity sector split as at 30 June 2021

Technology	30%
Healthcare	17%
Industrials	15%
Materials	11%
Consumer staples	10%
Financials	9%
Consumer discretionary	8%
Energy	0%
Utilities	0%
Telecoms	0%

Source: Goodbody

## Market commentary

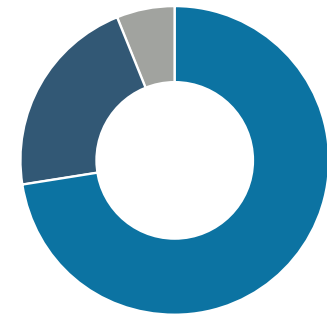
Global equities posted another strong month in June with the MSCI World Index rising by 4.6% in Euro terms, bringing the YTD performance to +16.6%. Covid-19 restrictions in most developed market countries continued to be lifted, aided by high vaccination rates. There was a noticeable rotation in underlying style performance in June with the MSCI World Growth Index rising by 7.8%, while the MSCI World Value Index rose by 1.8%. The Fed surprised the market with a more hawkish than expected meeting during the month. The Dot Plot, which officials use to forecast interest rates, was brought forward to price in two hikes in 2023, with seven members now expecting a hike in 2022. The yield curve flattened on the back of the news with the US 10-year yield dropping below 1.5%. The inflationary narrative continued to dominate headlines during the month. The headline y/y CPI inflation rate rose to 5%, largely driven by base effects, while the core CPI inflation rate rose by 0.7% m/m. Meanwhile, ISM PMI data remained strong driven by elevated demand, supply constraints and high pricing.

## Top 10 equity holdings as at 30 June 2021

Apple	4.3%
Microsoft	4.0%
Analog Devices	3.5%
ResMed	3.4%
Sika	3.2%
Republic Services	3.2%
Stryker	3.1%
Paychex	3.0%
Fastenal	3.0%
S&P Global	3.0%

Source: Goodbody

## Geographic equity mix as at 30 June 2021



North America	72%
Europe (ex. UK)	22%
Asia Pacific (ex. Japan)	6%
Japan	0%
UK	0%

Source: Goodbody

**Warning: Dividend Income is not guaranteed and may rise or fall in value.**

**Warning: The value of your investment may go down as well as up.**

**Warning: This fund may be affected by changes in currency exchange rates.**

**Warning: If you invest in this fund you may lose some or all of the money you invest.**

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Goodbody Asset Management

Goodbody Dividend Income Balanced Fund - **GDI 4**

- Dividend equities drive Fund performance in June
- Gold declines as risk appetite stays strong

Fund performance

The Fund delivered a solid return in June. Top performing dividend equity holdings during the month included ResMed, the medical equipment company (+22%), S&P Global (+12%) and Dollar General (+10%) the US discount retailer. A large product recall by a key competitor to repair/replace 3-4m sleep apnoea and ventilator machines was viewed as a positive market share opportunity for ResMed which saw earnings upgrades during the month. The Fund's bond holdings were essentially flat and unchanged in June. Gold declined 4%, while the Fund's downside risk management strategy (index put options) was also a drag given the backdrop of rising equity markets.

Fund price since inception



Share Class B (€)										
1 MTH	3 MTH	YTD	1 YR	3 YR p.a.	2020	2019	2018	2017	2016	Since inception
3.8%	5.4%	9.1%	14.1%	11.4%	9.6%	17.6%	-1.9%	3.4%	3.7%	49.6%

Source: Goodbody

Why consider the Goodbody Dividend Income Balanced Fund?

1. Income Oriented Multi Asset Exposure

The Fund invests in high quality dividend paying equities which act as the engine of real returns for investors. Other assets, such as cash, fixed income and exchange traded funds are used to provide diversification and reduce volatility.

2. Active asset allocation

The Investment Team employs an asset allocation framework to tactically adjust exposure to equities throughout the investment cycle.

3. Risk management strategy

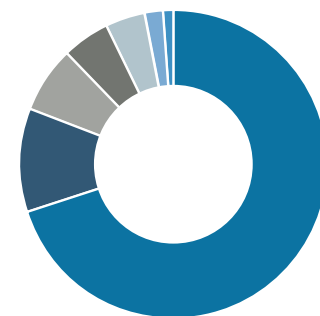
This strategy helps to reduce volatility and smooth the returns journey for investors.

The **Goodbody Dividend Income Balanced Fund** is a risk managed multi-asset fund which invests in high quality dividend paying stocks as well as income generating Bonds, REITS, Alternatives and Cash.

Key information

<b>Fund launch date</b>	18 December 2015
<b>Fund type</b>	UCITS
<b>Base currency</b>	€
<b>Pricing/Dealing</b>	Daily
<b>Share class</b>	B
<b>ISIN</b>	IE00BYWKP999
<b>Month end NAV (€)</b>	14.96
<b>Investment management fee</b>	0.50%

Asset Split as at 30 June 2021



Equity	70%
Corporate Bonds	11%
Cash	7%
Government Bonds	5%
Property	4%
Gold	2%
Put Options	1%

Source: Goodbody

**Warning: Past performance is not a reliable guide to future performance.**

Risk rating 1 2 3 4 5 6 7

## Equity sector split as at 30 June 2021

Technology	31%
Healthcare	17%
Industrials	15%
Materials	11%
Consumer staples	9%
Financials	9%
Consumer discretionary	8%
Energy	0%
Utilities	0%
Telecoms	0%

Source: Goodbody

## Market commentary

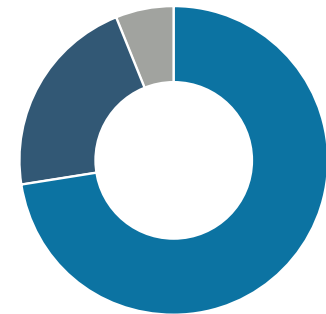
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## Top 10 equity holdings as at 30 June 2021

Apple	4.3%
Microsoft	4.0%
Analog Devices	3.5%
ResMed	3.4%
Sika	3.2%
Republic Services	3.2%
Stryker	3.1%
Paychex	3.0%
Fastenal	3.0%
S&P Global	3.0%

Source: Goodbody

## Geographic equity mix as at 30 June 2021



North America	72%
Europe (ex. UK)	22%
Asia Pacific (ex. Japan)	6%
Japan	0%
UK	0%

Source: Goodbody

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## Goodbody Asset Management

### Goodbody Global Leaders Fund

- Resilience, Adaptability, Execution – ‘Own the Best, Not the Rest’
- Nike – Just Do It.

Risk rating 1 2 3 4 5 6 7

### Fund performance

Fund performance was very strong in June. ResMed (+22%) – the Global Leader in the treatment of sleep apnea – and Nike (+17%) – the dominant Consumer Sports company in the world – were among the top contributors to performance. Nike, a business we have consistently used to illustrate the concept of Longevity, reported a very strong set of results during the month. More importantly, Nike outlined a new multi-year plan that implies an inflection in both future growth and profitability relative to pre-Covid levels. This forward-looking blueprint provides additional credibility to the idea that Nike is a superior business post Covid than it was before.

### Fund price since inception



	1 MTH	3 MTH	YTD	1 YR	2020	2019	Since inception
Fund	8.0%	12.3%	18.3%	35.6%	20.3%	37.5%	83.2%
Benchmark	4.6%	6.8%	16.6%	31.7%	6.3%	30.0%	52.8%

Source: Goodbody, Bloomberg

Performance of Goodbody Global Leaders Fund

### Why consider the Goodbody Global Leaders Fund?

#### 1. More profitable today

Invest in a select group of dominant companies with sustained leadership positions. These are among the most profitable companies in their industry.

#### 2. More profitable tomorrow

The fund invests in companies with some of the best track records of successful innovation. Such innovation sustains their leadership positions. These leaders of today can also be the most profitable companies of tomorrow.

#### 3. Investment opportunity

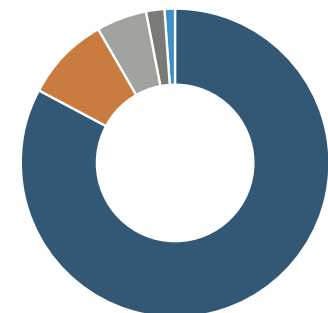
Global Leaders present a compelling risk/reward opportunity as they consistently widen the gap with competitors. This can lead to significant share price outperformance over time.

The **Goodbody Global Leaders Fund**, an actively-managed, concentrated, global equity fund invests in a diversified portfolio of 40 companies that dominate their industries. The fund aims to outperform the MSCI World Index over the medium to long-term.

### Key information

<b>Fund launch date</b>	13 December 2018
<b>Fund type</b>	UCITS
<b>Base currency</b>	€
<b>Pricing/Dealing</b>	Daily
<b>Share class</b>	B
<b>ISIN</b>	IE00BFMXM056
<b>Month end NAV (€)</b>	18.32
<b>Investment management fee</b>	0.50%
<b>Number of holdings</b>	36
<b>Top 10 as % of the fund</b>	33%
<b>Active share*</b>	91%

### Geographic mix as at 30 June 2021



■ North America	82%
■ Europe (ex. UK)	9%
■ UK	5%
■ Asia Pacific (ex. Japan)	2%
■ Japan	1%

Source: Goodbody

**Warning: Past performance is not a reliable guide to future performance.**

## Sector split as at 30 June 2021

Technology	34%
Healthcare	24%
Industrials	17%
Consumer discretionary	11%
Consumer staples	6%
Materials	5%
Financials	4%
Energy	0%
Real Estate	0%
Telecoms	0%
Utilities	0%

Source: Goodbody

## Market commentary

Global equities posted another strong month in June with the MSCI World Index rising by 4.6% in Euro terms, bringing the YTD performance to +16.6%. Covid-19 restrictions in most developed market countries continued to be lifted, aided by high vaccination rates. There was a noticeable rotation in underlying style performance in June with the MSCI World Growth Index rising by 7.8%, while the MSCI World Value Index rose by 1.8%. The Fed surprised the market with a more hawkish than expected meeting during the month. The Dot Plot, which officials use to forecast interest rates, was brought forward to price in two hikes in 2023, with seven members now expecting a hike in 2022. The yield curve flattened on the back of the news with the US 10-year yield dropping below 1.5%. The inflationary narrative continued to dominate headlines during the month. The headline y/y CPI inflation rate rose to 5%, largely driven by base effects, while the core CPI inflation rate rose by 0.7% m/m. Meanwhile, ISM PMI data remained strong driven by elevated demand, supply constraints and high pricing.

## Top 10 holdings as at 30 June 2021

ResMed	3.5%
Microsoft	3.4%
Moody's	3.4%
Hermès	3.3%
Intuit	3.2%
Agilent Technologies	3.2%
IDEX Corp	3.2%
Zoetis	3.2%
Paylocity	3.1%
DSV Panalpina	3.1%

Source: Goodbody

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\*Active Share is a measure of the Fund's overlap with the benchmark. An active share of 100% indicates that the Fund has no holdings in common with the benchmark and active share of 0% indicates a Fund that tracks the benchmark.

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Goodbody Asset Management

Goodbody Global Smaller Companies Fund

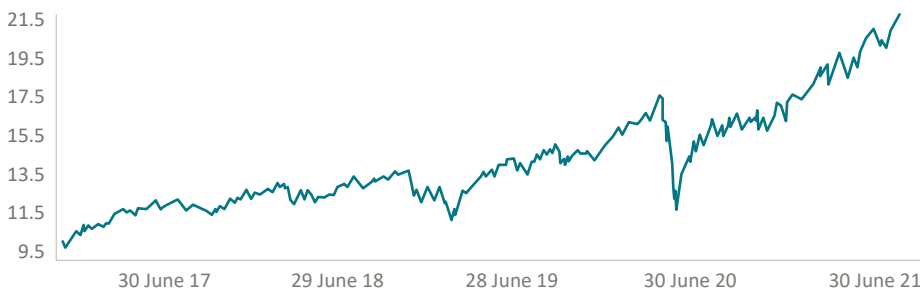
- Strong outperformance in June
- Altium jumps on takeover approach

Risk rating 1 2 3 4 5 **6** 7

Fund performance

The Fund delivered strong outperformance versus its benchmark in June. Stock selection was the main contributor to performance with an additional tailwind from sector allocation (technology in particular). Top performing holdings during the month included US energy technology company Generac (+30%), Australian software company Altium (+30%) and US healthcare company Masimo (+16%). Altium jumped on the back of a takeover approach by larger US peer Autodesk – we have subsequently started to reduce the Fund’s position. We also exited the Fund’s holding in Principle Financial Group as our conviction in the investment case has declined. The Fund finished the first half of the year ahead of its benchmark.

Fund price since inception



	1 MTH	3 MTH	YTD	1 YR	3 YR p.a.	2020	2019	2018	2017	Since inception
Fund	5.6%	10.0%	20.2%	39.4%	19.6%	13.6%	38.6%	-7.4%	17.8%	119.6%
Benchmark	3.5%	5.0%	17.4%	40.9%	12.3%	6.8%	30.0%	-8.9%	8.4%	75.8%

Source: Goodbody, Bloomberg

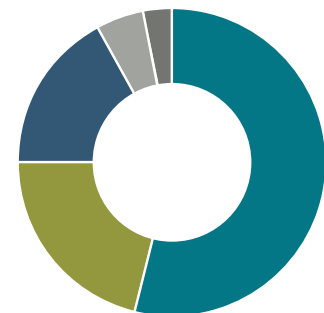
Performance of Goodbody Global Smaller Companies Fund

The **Goodbody Global Smaller Companies Fund** is an actively managed, concentrated global equity fund that offers an investment in a diversified portfolio of 40 small/mid sized growth companies. The fund aims to outperform the MSCI World Small/Mid cap index over the medium to long-term.

Key information

<b>Fund launch date</b>	28 October 2016
<b>Fund type</b>	UCITS
<b>Base currency</b>	€
<b>Pricing/Dealing</b>	Daily
<b>Share class</b>	B
<b>ISIN</b>	IE00BYNJJZ92
<b>Month end NAV (€)</b>	21.96
<b>Investment management fee</b>	0.50%
<b>Number of holdings</b>	35
<b>Top 10 as % of the fund</b>	37%
<b>Active share*</b>	98%

Geographic mix as at 30 June 2021



■ North America	54%
■ Europe (ex. UK)	21%
■ UK	17%
■ Asia Pacific (ex. Japan)	5%
■ Japan	3%

Source: Goodbody

Why consider the Goodbody Global Smaller Companies Fund?

1. Return enhancement potential

Global small/mid cap equities have historically offered a compelling risk/reward opportunity compared to their large cap counterparts.

2. Diversification benefits

The fund invests in a segment of the equity market that is frequently overlooked and neglected by other investors.

3. Proven smaller company expertise

Our investment team has successfully delivered strong performance in the small/mid cap segment of the equity market over the last 15 years.

**Warning: Past performance is not a reliable guide to future performance.**



## Sector split as at 30 June 2021

Industrials	36%
Technology	21%
Consumer discretionary	15%
Healthcare	15%
Financials	6%
Materials	6%
Energy	2%
Consumer staples	0%
Real Estate	0%
Telecoms	0%
Utilities	0%

Source: Goodbody

## Market commentary

Global equities posted another strong month in June with the MSCI World Index rising by 4.6% in Euro terms, bringing the YTD performance to +16.6%. Covid-19 restrictions in most developed market countries continued to be lifted, aided by high vaccination rates. There was a noticeable rotation in underlying style performance in June with the MSCI World Growth Index rising by 7.8%, while the MSCI World Value Index rose by 1.8%. The Fed surprised the market with a more hawkish than expected meeting during the month. The Dot Plot, which officials use to forecast interest rates, was brought forward to price in two hikes in 2023, with seven members now expecting a hike in 2022. The yield curve flattened on the back of the news with the US 10-year yield dropping below 1.5%. The inflationary narrative continued to dominate headlines during the month. The headline y/y CPI inflation rate rose to 5%, largely driven by base effects, while the core CPI inflation rate rose by 0.7% m/m. Meanwhile, ISM PMI data remained strong driven by elevated demand, supply constraints and high pricing.

## Top 10 holdings as at 30 June 2021

ICON	4.2%
Generac	4.1%
MSA Safety	3.9%
Allegion	3.9%
Halma	3.7%
IDEX Corp	3.6%
Tractor Supply	3.6%
Diploma	3.5%
Keysight Technologies	3.4%
Cooper Companies	3.4%

Source: Goodbody

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