

## **SIGNIFICANT EXPANSION PLANS IN THE BENELUX; PARTNERSHIP WITH OCEANSIDE**

*Registration of the World Stars Global Equity Fund in the Netherlands*

### **London, UK - 18/12/24**

J. Stern & Co. is pleased to announce the successful registration of its World Stars Global Equity UCITS Fund in the Netherlands. The fund was launched in 2019 and provides investors of all types with the opportunity to participate in the long-term capital growth being delivered by the World Stars Global Equity strategy, which has been managed by the firm since 2012.

The World Stars strategy invests in 20-30 high quality, sustainable, large-cap, global companies. They must have enduring competitive advantages, financial strength, a long runway of growth and a track record of value creation. The investment process is research-intensive, disciplined and unconstrained; with a strong preference for companies that are listed in leading developed markets. ESG research is fully integrated using a proprietary framework. Quality is our defining condition which we apply to both companies and industries.

The senior equity investment team have worked together at J. Stern & Co. since 2014. Over the last ten years to 30/11/24 the strategy has delivered 13.1% CAGR in EUR and 11.1% CAGR in USD, both net of our standard fee and well ahead of the comparator index, the MSCI World NTR. The World Stars strategy and the UCITS fund have been ranked in the 1<sup>st</sup> quartile of large-cap global equity funds for most investment periods since inception.

J. Stern & Co. is an investment partnership based in London, New York, Malta and Zurich, founded in 2012. The investment philosophy builds on the approach used by the Stern family for the previous 80 years. The firm has AUM of over US\$2bn, including c.20% owned by the Stern family and the partners. This creates a powerful alignment of interest with clients. AUM in the World Stars strategy is currently over US\$1.6bn including US\$383m in the World Stars UCITS fund and US\$385m in the US LP fund.

J. Stern & Co. has now partnered with Oceanside Financial Services, an outsourced distribution services company, to develop and maintain relationships with professional investors in the Benelux region, focused on the World Stars Global Equity strategy. “In Oceanside we have found an experienced partner that has a strong network and a deep understanding of the local requirements of professional investors”, said Jérôme Stern, Managing Partner.

Commenting on the partnership, Tim Soetens, Co-Founder and Managing Partner of Oceanside, said: “We partner exclusively with regulated asset managers who meet our stringent selection criteria. These include a differentiated investment proposition with a strong track record, a disciplined and repeatable investment process, and significant alignment with investors' interests. We believe that J. Stern's World Stars strategy exemplifies these qualities.”

### **Oceanside Financial Services**

Oceanside is an Outsourced Distribution Services provider which offers comprehensive support and strategic guidance to specialist asset managers who are aiming to accelerate their distribution effort with a primary focus on the Benelux region.

With a combined experience of over 45 years in distribution and leadership positions for renowned asset managers, the team at Oceanside brings unparalleled distribution knowledge and skill to the table.

The team at Oceanside are passionate about creating significant value for both the specialist asset managers they collaborate with and our extensive professional investor network. Oceanside aims to redefine the landscape of Outsourced Distribution Services in the asset management sector.

## **Contact details**

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