

Rondure Funds Glide Past 3-Year Mark

The Rondure New World Fund and the Rondure Overseas Fund passed their 3-year anniversary on May 1, 2020 with strong relative performance.

SALT LAKE CITY, UTAH, UNITED STATES, June 3, 2020 /EINPresswire.com/ -- The [Rondure New World Fund](#) and the [Rondure Overseas Fund](#) passed their 3-year anniversary on May 1, 2020 with strong relative performance for the period. The Funds are managed by 20-year veteran [Laura Geritz, CFA, with Blake Clayton, DPhil](#), co-managing the Rondure Overseas Fund. Ms. Geritz broke off from Wasatch Advisors in 2016 to found Rondure as a woman-owned, boutique investment firm focused on finding what we believe to be the highest quality companies around the globe of any size. The Rondure New World Fund is an emerging markets focused fund, while the Rondure Overseas Fund is focused on developed markets outside the US.

Said Rondure Global Founder and CEO, Laura Geritz, “What an incredible past three years. We feel very fortunate to have reached this point in our journey in building a strong, woman-owned firm that is dedicated to delivering for our clients. We have a fantastic investment team that has been in place since the inception of the strategies. It is a difficult time in the world, yet we remain tremendously energized by the high-quality investment opportunities we are finding around the globe.”

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Laura Geritz, Founder & CEO



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Portfolio Manager Blake Clayton added, “The silver lining of the market sell-off earlier this year is that we were finally able to pick up some of the highest quality names on our CGP* watchlist, after having launched into such a strong bull market in 2017. We could not be more excited for the future and our ability to find what we think are the highest quality names for our clients.”

Crystal Gourley, Head of Sales and Client Relations, shared, "Over the past three years, we have met with a wide variety of capital allocators and investment advisors. We see strong interest in global high-quality investing and our firm. We appreciate each of our clients who have invested with us over the past few years and seek to deliver good results for them over the long-term."

Annualized Returns as of 3/31/20 (1-Year, 3-Year, Since Inception*)

Rondure New World (RNWOX): -15.39%, n/a, -3.38%

MSCI Emerging Markets Index: -17.36%, n/a, -2.09%

Rondure Overseas (ROSOX): -11.54%, n/a, -0.16%

MSCI EAFE Index: -13.93%, n/a, -2.33%

Annualized Returns as of 5/31/20 (1-Year, 3-Year, Since Inception*)

Rondure New World (RNWOX): -1.08%, 0.80%, 1.27%

MSCI Emerging Markets Index: -4.02%, 0.22%, 1.11%

Rondure Overseas (ROSOX): 1.62%, 3.01%, 3.98%

MSCI EAFE Index: -2.40%, 0.11%, 1.24%

*Inception: 5/1/17.

Performance data quoted represents past performance. Past performance is no guarantee of future results and investment returns and principal value of the Fund will fluctuate so that shares, when redeemed, may be worth more or less than their original cost. Current performance may be higher or lower than the performance quoted. For the most current month-end performance data please visit www.rondureglobal.com.

The Advisor has contractually agreed to waive and/or reimburse fees or expenses through at least August 31, 2020.

Rondure Funds will deduct a 2.00% redemption fee on Fund shares held 60 days or less. Performance data does not reflect the deduction of fees, including sales charges, or the taxes you would pay on fund distributions or the redemption of fund shares. Fees and taxes, if reflected, would reduce the performance quoted. For more complete information including charges, risks and expenses, read the prospectus carefully.

Diversification does not eliminate the risk of experiencing investment loss.

Total Gross Expense Ratios as of 8/31/19 are 1.76% Gross / 1.35% Net for RNWOX, 1.46% Gross / 1.10% Net for RNWIX, 2.04% Gross / 1.10% Net for ROSOX, and 1.72% Gross / 0.85% Net for ROSIX.

About Rondure Global Advisors

Rondure Global Advisors® is a woman-owned investment adviser focused on High-Quality equity

investing for the long-term. Rondure takes a bottom-up approach using disciplined global screening, rigorous “boots on the ground” company research, and close attention to valuation to find what we believe to be the best investment opportunities, anywhere in the world. Our global perspective is index-agnostic and our style is all-cap. Our investment philosophy is centered on investing in what we believe are very high-quality companies at good to great prices that we believe can provide sustainable growth over the long-term. We are deeply client-focused and actively cost-conscious because we are heavily invested alongside our clients for the long haul.

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The objective of both the Rondure New World Fund and Rondure Overseas Fund is long-term growth of capital.

RISKS: Mutual fund investing involves risks and loss of principal is possible. Investing in foreign securities entails special risks, such as currency fluctuations and political uncertainties, which are described in more detail in the prospectus. Investments in emerging markets are subject to the same risks as other foreign securities and may be subject to greater risks than investments in foreign countries with more established economies and securities markets.

An investor should consider investment objectives, risks, charges, and expenses carefully before investing. To obtain a Rondure Funds prospectus, containing this and other information, visit www.rondureglobal.com or call 1-855-775-3337. Please read it carefully before investing.

The MSCI Emerging Markets Total Return USD Index is an unmanaged total return index, reported in U.S. Dollars, based on share prices and reinvested dividends of approximately 800 companies from 24 emerging market countries. The MSCI EAFE Total Return USD Index is an unmanaged total return index, reported in U.S. dollars, based on share prices and reinvested net dividends of approximately 1,100 companies from 22 developed market countries excluding the US and Canada. You cannot invest directly in an index.

Wasatch Advisors is not affiliated with Rondure Global Advisors.

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*CGP (Club, Glue, Platform) is a proprietary quality framework created by Rondure Global Advisors and designed to help us find high-quality companies that we believe have a true sustainable competitive advantage. We believe a company with certain club, glue and platform characteristics may allow the company to compound over time.

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