

Allianz RCM BRIC Stars Fund



Why Allianz RCM BRIC Stars...

- It's the **UK's only onshore BRIC fund**, supported by leading life companies and supermarket platforms.
- Few fund managers are as well equipped as Allianz Global Investors, **one of the largest asset managers in the world**. The Allianz RCM BRIC Stars Fund takes full advantage of our global resources and is managed by RCM, our dedicated global equity firm. The RCM team of 75 researchers and analysts, located around the globe with units across Asia and links in Russia, provides first-hand information and advice on local companies and markets.
- Six global themes are reshaping the world's economic landscape; agriculture, infrastructure, energy, eco-technology, commodities and emerging wealth. At the heart of each of these there's a BRIC story.
- The Fund is managed by Michael Konstantinov, a **highly regarded fund manager** with a strong background in emerging markets. He is supported by six portfolio managers, with a combined average of 15 years' experience each.
- RCM's **unique research tool**, Grassroots®, sees 12 full-time staff, 300 researchers and 50,000 industry contacts conduct on-the-ground research, talking to a wide range of people from company management and retail outlets to customers and employees, unearthing valuable investment information.
- A focus on companies with attractive fundamentals and **strong growth prospects**, using our vast resources to carefully pick the most promising opportunities.
- The Fund's **robust investment process** is a unique combination of systematic country allocation and bottom-up stock selection which drives performance.
- An **optimum risk/return profile** avoids relying on market cap weightings which can result in high allocation to one or two countries. Instead, the Fund has a weighted benchmark strategy with equal weights to each BRIC country, providing fund managers with a clear focus on allocation.
- The Fund is **A rated by OBSR**, based on the quality of the investment process.
- A **flexible investment approach** means that up to a third of the Fund may be invested in non-BRIC countries that will benefit from the BRIC effect.
- Allianz RCM BRIC Stars Fund currently has an OBSR A rating and is also rated by Rayner Spencer Mills.

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An investment for longer term investors prepared for higher risk

Details of the specific and general risks associated with our funds are contained within the simplified prospectus. You should always read this before investing. For a copy visit www.allianzgi.co.uk or telephone 0800 84 84 94. Past performance is not a reliable indicator of future performance. You should not make any assumptions on the future on the basis of performance information. The value of an investment and the income from it can fall as well as rise as a result of market and currency fluctuations and you may not get back the amount originally invested. Issued by Allianz Global Investors (UK) Limited authorised and regulated in the UK by the Financial Services Authority. Allianz Global Investors (UK) Limited operates the Fund and AGI GmbH, Germany has been delegated the management of the fund. J2011-10371.

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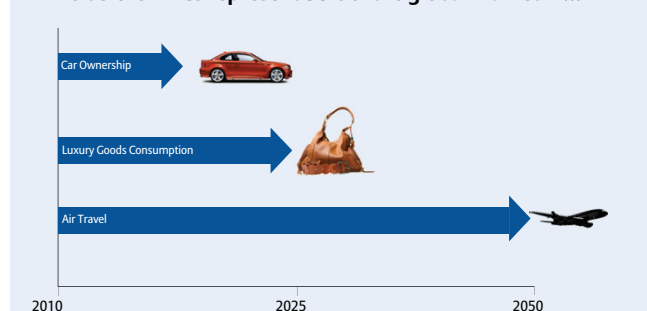
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BRICs: Architects of a new world...

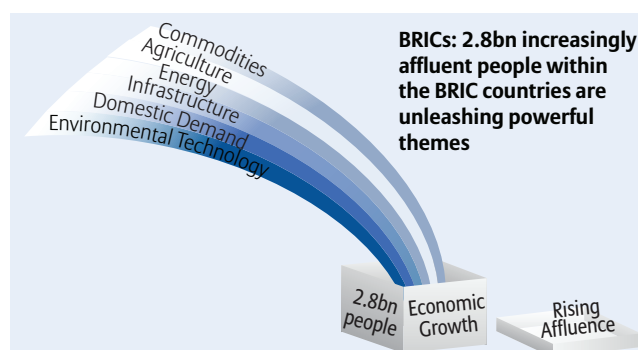
- **BRIC equity markets have outperformed general emerging markets** in four out of the last five calendar years
Source: RCM UK/ Mellon Analytical.
- The US emerged in the late 19th century and Japan in the 1960s, the BRIC economies - Brazil, Russia, India and China - look set to **challenge the economic world order** in the first half of the 21st century. Overlooking them could mean missing out on major growth potential.
- Some commentators argue that we are already witnessing **the end of US economic leadership**. Instead, the global economy is becoming more balanced, with BRIC countries such as India and China having a larger influence.
- Together, the four BRIC countries contain over **42% of the world's population**. With no pensions crisis to divert spending, facts suggest that consumption could continue to rise for some time.

- The BRIC's could dominate many markets, not only in terms of growth and incremental demand, but also - for the first time - in terms of absolute magnitude of their consumption.
- A new middle class is emerging in the BRIC countries, with many individuals generating more wealth than ever before. This has led to an increase in domestic spending on luxury goods.
- There is increasing economic interaction between the four countries, with India and China acting as the engines of growth, driving demand for commodities and energy supplied by Brazil and Russia.
- As these economies develop, **massive sums are being invested** to improve power, telecommunications and transport systems, especially in India and China, providing further opportunities for domestic companies.

Time before BRICs represent 50% of the global market in...



Source: Goldman Sachs Asset Management, 3.12.10.



Source: Goldman Sachs, 31.12.09.

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