

Spotlight Fund of the Month

Quick Facts

Janus Henderson Overseas Fund (JIGFX)
Morningstar --- ☆☆☆☆
Category --- US Fund Foreign Large Blend
Total Assets --- \$4.0 billion

Janus Henderson
 — INVESTORS —

Why We Like This Fund

The Janus Henderson Overseas Fund (JIGFX) seeks to grow capital by investing in companies outside the U.S. that generate strong free cash flows yet remain unrecognized by the broader market. The fund is a high-conviction, concentrated portfolio of 30-50 companies spanning market capitalizations and styles, as management believes quality companies across the equity style box can contribute to strong, risk-adjusted returns, regardless of prevailing market conditions. The fund diversifies across regions and sectors, allowing analysts and portfolio managers to select the best opportunities within their investment universe of non-U.S. companies. Rigorous fundamental analysis anchors the philosophy and process behind this strategy, allowing managers to translate their conviction into portfolio impact and ensure stock selection is the primary driver of returns. The portfolio management team's extensive experience investing internationally is evident in the fund's strong track record, having achieved top-quartile returns within its category over the trailing five- and ten-year periods. A comprehensive risk management strategy helps ensure that the portfolio avoids unwanted portfolio style or factor concentration, which limits statistics like maximum total drawdown – an important metric held well below the category average and benchmark readings historically.

Where to Use

The Janus Henderson Overseas Fund (JIGFX) is an excellent option for investors looking to diversify equities within their portfolio and gain broader market exposure. The strategy's approach makes a fitting allocation for investors who are particularly concerned about high valuations in large-cap growth allocations, given the fund's tilt towards stocks with lower valuations and high free cash flow generating companies.

What are the Top-Rated Funds Lists?

The Top-Rated Mutual Funds and Exchange Traded Funds (ETF) Lists are resources that feature a list of equity, fixed income, and alternative mutual funds or ETFs that are selected by Osaic Research using proprietary screening criteria and selection methodology. The lists are designed to help you narrow the wide universe of funds available to a more manageable selection of higher-quality funds. Spectrums of asset class categories are covered. In most categories, you will find at least one risk-averse fund option and one option where the focus is geared more toward alpha generation, with the potential for higher volatility.

You can access the Top-Rated Funds Lists by visiting the Market Research page through Vision2020 or by reaching out to Research@Osaic.com.

Disclosures

The statements provided herein are based solely on the opinions of the Osaic Investment Research Team and are being provided for general information purposes only. Neither the information nor any opinion expressed constitutes an offer or a solicitation to buy or sell any securities or other financial instruments. Any opinions provided herein should not be relied upon for investment decisions and may differ from those of other departments or divisions of Osaic Wealth, Inc. ("Osaic") or its affiliates.

Certain information may be based on information received from sources the Osaic Investment Research Team considers reliable; however, the accuracy and completeness of such information cannot be guaranteed. Certain statements contained herein may constitute "projections," "forecasts" and other "forward-looking statements" which do not reflect actual results and are based primarily upon applying retroactively a hypothetical set of assumptions to certain historical financial information. Any opinions, projections, forecasts and forward-looking statements presented herein reflect the judgment of the Osaic Investment Research Team only as of the date of this document and are subject to change without notice. Osaic has no obligation to provide updates or changes to these opinions, projections, forecasts and forward-looking statements. Osaic is not soliciting or recommending any action based on any information in this document.

Past performance does not guarantee future results. Investment returns and principal value fluctuate. Indexes are unmanaged and investors are not able to invest directly into any index.

The spotlight Mutual Fund of the month reflects the Osaic Investment Research Team's screening process and does not constitute a personalized recommendation. Financial Professionals should assess suitability based on client investment objectives and risk tolerances and should carefully read the prospectus to consider the investment objectives, risks, charges, and expenses of a fund.

FOR FINANCIAL PROFESSIONAL USE ONLY: Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc. and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Osaic Services, Inc. and Ladenburg Thalmann & Co., broker-dealers and members of FINRA and SIPC. Advisory services are offered through Ladenburg Thalmann Asset Management, Inc., Osaic Advisory Services, LLC. and CW Advisors, LLC., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc. are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser. 8684275