



QuotedData

BY MARTEN & CO

Polar Capital Global Healthcare - Update from QuotedData

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Vital signs are good

Polar Capital Global Healthcare (PCGH) continues to make progress, delivering impressive outperformance of its [benchmark](#) the MSCI All Countries World Healthcare Index, as the table on page 3 shows, and benefitting from a narrowing of its [discount](#) as more investors embrace the story. PCGH's managers believe that the healthcare sector's fundamentals (factors believed to contribute to the core value or overall worth of a business) are good enough to underpin the growth story for the foreseeable future.

Since we last published, the managers have substantially reshaped the [portfolio](#) to take advantage of the themes that continue to drive its long-term growth. These include innovative new therapies, higher patient numbers, and the continued ageing of the global population, which is associated with an increase in chronic disease. The managers say that these growth drivers are accompanied by attractive [valuations](#).

Full Research:

<https://quoteddata.com/research/polar-capital-global-healthcare-vital-signs-are-good-qd/>

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