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European equity funds: Investment professionals' favorites

Which products focusing on European equities are fund experts currently recommending to their clients? FONDS professionell ONLINE asked asset managers and financial advisors to name their favorites and briefly explain their choices. The result is an extremely interesting list of top funds.

Contrarian positioning: **Fidcum SICAV-Contrarian Value Euroland**

By Conrad Lauterbach, CEO, Allington Investors, Bad Homburg

Since its inception in 2008, fund manager Hans-Peter Schupp has consistently pursued his contrarian value approach with his fund. Based on in-depth fundamental analysis, he builds a concentrated portfolio of companies that can often be acquired at a significant discount to their intrinsic value due to an overreaction on the stock market. This is based on the conviction that investors with a longer-term orientation can benefit particularly from a contrarian positioning over investment periods of three to five years. This is because the market often loses its head in the short term, only to return to a more rational valuation in the medium term. Due to its approach, the portfolio is always particularly aggressive when a market downturn has preceded it and a number of stocks can be acquired at particularly favorable prices. In an advanced market upturn, the portfolio consists mainly of stable stocks.

In our view, the fact that the portfolio includes companies of all market capitalizations is particularly attractive, as it offers the opportunity to benefit not only from large international corporations but also from attractively valued and neglected smaller companies.

Source: Fondprofessionell ONLINE

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