



Press Release

10 January 2022

Baillie Gifford appoints Ross Mathison manager of the Global Income Growth and Responsible Global Equity Income Funds

Baillie Gifford, the global investment management partnership, has appointed Ross Mathison as a portfolio manager of its Global Income Growth Fund and Responsible Global Equity Income Fund, joining existing managers James Dow and Toby Ross on the funds from 1 January 2022.

Ross Mathison joined Baillie Gifford in 2019 as an investment manager having previously worked at Aviva Investors and, prior to that, nine years at Standard Life Investments.

The £814m Baillie Gifford Global Income Growth Fund aims to achieve growth in both income and capital over rolling five-year periods, whilst delivering a yield higher than that of the MSCI ACWI Index over rolling five-year periods¹. The fund is ranked 2/43 among its peers (five years to 30 November 2021).

In December, the £312m Responsible Global Equity Income Fund achieved its three-year track record. It seeks to invest responsibly in companies which can deliver both a resilient income stream and real growth in income and capital. Since inception*, the fund is ranked 2/48 in its sector (as at 30 November 2021).

James Budden, Director, Retail Marketing & Distribution, Baillie Gifford, says:

“Ross’ appointment recognises the significant contribution he has made since he joined Baillie Gifford two years ago. This new role will see him assume greater responsibilities for decision making and overall portfolio construction. His promotion further strengthens an already experienced and successful team whose total returns to shareholders have proved resilient through volatile times for income investors.”

*6 December 2018.

-Ends-

For further information, please contact:

James Budden, Baillie Gifford

0131 275 2816

Jonathan Atkins/Alastair Doyle
Four Communications

020 3697 4200

www.bailliegifford.com

Notes to editors:

¹ The manager believes this is an appropriate benchmark given the investment policy of the Fund and the approach taken by the manager when investing. In addition, the manager believes an appropriate performance comparison for this Fund is the Investment Association Global Equity Income Sector. There is no guarantee that this objective will be achieved over any time period and actual investment returns may differ from this objective, particularly over shorter time periods.

All investment strategies have the potential for profit and loss, capital is at risk. Past performance is not a guide to future returns.

More information on the Fund can be found on the [website](#).

Ross Mathison

Ross joined Baillie Gifford in 2019 as an Investment Manager in the Global Income Growth Team. Previously, he had spent a year at Aviva Investors and prior to that nine years at Standard Life Investments as an Investment Manager, first in the European Equity Team and latterly in the Global Equity Team. Ross is a CFA Charterholder and graduated MA (Hons) in Business & Finance from Heriot-Watt University in 2008. Ross also sits on the Board of Directors at Aberlour, a Scottish Children's charity.

Baillie Gifford is an independent investment partnership founded in Edinburgh in 1908, focused on long-term growth investing in some of the world's most exciting companies. With 1,576 staff and assets under management of £346bn, at 30 September 2021, it has offices in Edinburgh (HQ), Dublin, Frankfurt, Hong Kong, Krakow, London, New York, Shanghai, Toronto and Zurich.

Important Information

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All information is sourced from Baillie Gifford & Co and is as at 30 November 2021 unless otherwise stated.