

# 富蘭克林證券投資顧問股份有限公司 函

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主旨： 富蘭克林坦伯頓全球投資系列一新興國家固定收益基金(本基金有相當比重投資於非投資等級之高風險債券且基金之配息來源可能為本金)及富蘭克林坦伯頓全球投資系列一全球平衡基金(本基金之配息來源可能為本金)經理人團隊異動通知。

說明： 自 2018 年 1 月 2 日起，富蘭克林坦伯頓全球投資系列一新興國家固定收益基金(本基金有相當比重投資於非投資等級之高風險債券且基金之配息來源可能為本金)及富蘭克林坦伯頓全球投資系列一全球平衡基金(本基金之配息來源可能為本金)均新增經理人桑娜·德賽(Sonal Desa)，基金經理團隊異動如下：

基金名稱	現任基金經理團隊	新任基金經理團隊
富蘭克林坦伯頓全球投資系列一新興國家固定收益基金(本基金有相當比重投資於非投資等級之高風險債券且基金之配息來源可能為本金)	麥可·哈森泰博(Michael Hasenstab) 蘿拉·柏克(Laura Burakreis)	麥可·哈森泰博(Michael Hasenstab) 蘿拉·柏克(Laura Burakreis) 桑娜·德賽(Sonal Desai)
富蘭克林坦伯頓全球投資系列一全球平衡基金(本基金之配息來源可能為本金)	麥可·哈森泰博(Michael Hasenstab) 彼得·溫赫斯特(Peter Wilmshurst)	麥可·哈森泰博(Michael Hasenstab) 彼得·溫赫斯特(Peter Wilmshurst) 桑娜·德賽(Sonal Desai)

此項變動不會影響本基金既有之投資政策，在未來一期的中文月報單張中，經理人異動情況將做同步調整。

董事長 嚴守白

正本：英屬百慕達商友邦人壽保險股份有限公司台灣分公司

副本：

桑娜·德賽(Sonal Desai)，博士  
資深副總裁、基金經理人  
研究主任  
坦伯頓全球宏觀投資團隊  
聖馬蒂奧，加州，美國



2018/1/5 更新

- 桑娜·德賽博士擔任坦伯頓全球宏觀投資團隊的研究主任、基金經理人。負責團隊研究的規畫、全球總體經濟分析，涵蓋各趨勢議題、區域及國家分析，以及利率、匯率及主權債信市場展望等。
- 德賽博士已有 23 年產業經驗，於 2009 年加入富蘭克林坦伯頓基金集團。以擔任匹茲堡大學經濟系助理教授為生涯起點，之後在國際貨幣基金組織任職的六年間，參與協調與監督新興國家的貸款計畫，以及評估國際貨幣基金組織調整方案的整體規劃與成效。
- 德賽博士加入設在倫敦的私人金融機構 Dresdner Kleinwort Wasserstein 約五年時間，擔任董事與資深總經分析師，負責土耳其、俄羅斯、與其他歐非中東地區國家的總體經濟分析；隨後加入 Thames River Capital 公司的全球公司債團隊，負責制定團隊由上而下的全球總經觀點與市場趨勢，區域涵蓋十大工業國與全球新興市場。
- 德賽博士先後於新德里取得德里大學(榮譽)學士，於美國西北大學取得經濟學博士學位。

2018/1/5 更新

SONAL DESAI, PH.D.

Senior Vice President, Portfolio Manager

Director of Research

Templeton Global Macro

Franklin Advisers, Inc.

San Mateo, California, United States

Sonal Desai, Ph.D., is a senior vice president and director of research for Templeton Global Macro. Dr. Desai is a portfolio manager for a number of funds, including Templeton Global Bond Fund and Templeton Global Total Return Fund.

Global Macro offers global, unconstrained investment strategies through a variety of investment vehicles ranging from retail mutual funds to unregistered, privately offered hedge funds.

Dr. Desai is responsible for shaping the team's research agenda of in-depth global macroeconomic analysis covering thematic topics, regional and country analysis, and interest rate, currency and sovereign credit market outlooks. This includes facilitating broader research efforts leveraging Franklin Templeton's local fixed income investment professionals across global markets.

Dr. Desai joined Franklin Templeton Investments in 2009 from Thames River Capital in London. She started her career in 1994 as an assistant professor of economics at the University of Pittsburgh, and then worked for over six years at the International Monetary Fund in Washington, DC. Following this, she joined the private financial sector and worked for about five years as director and senior economist for Dresdner Kleinwort Wasserstein in London.

Dr. Desai holds a Ph.D. in economics from Northwestern University and a B.A. in economics from Delhi University. She is part of the Templeton Global Bond Fund portfolio management team named Morningstar's Fixed Income Manager of the Year in Canada in 2013.

*Dr. Desai has 23 years of industry experience, including seven with Franklin Templeton. She is a portfolio manager for a number of funds, including the FTIF-Templeton Global Bond Fund and FTIF-Templeton Global Total Return Fund. As director of research, Dr. Desai is responsible for shaping the team's research agenda of in-depth global macroeconomic analysis covering thematic topics, regional and country analysis, and interest rate, currency and sovereign credit market outlooks.*

#### **SONAL DESAI, PH.D.**

Director of Research

International Bond Department

Franklin Templeton Fixed Income Group

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Sonal Desai, Ph.D., is director of research for the Franklin Templeton Fixed Income Group's international bond department. She is responsible for shaping the research agenda of the international bond department, and providing macroeconomic analysis to the fixed income team. This includes facilitating broader research efforts leveraging the fixed income group's local resources across several emerging markets. Dr. Desai

acts as a key resource for the firm's Fixed Income Policy Committee, which provides policy views on sectors, markets and currencies.

Dr. Desai started her career as an assistant professor of economics at the University of Pittsburgh, and then worked for six years at the International Monetary Fund, where she was involved in the negotiation and monitoring of Fund programs in several emerging market countries, and in the assessment of the overall design and effectiveness of IMF adjustment programs. She then joined the private financial sector, and worked for about five years as a director and senior economist for Dresdner Kleinwort Wasserstein in London, where she oversaw macroeconomic coverage of Turkey, Russia and other sub-investment EMEA. She then joined the global credit team at Thames River Capital in London, where she was responsible for shaping the team's top-down global view on macroeconomic and market developments, covering both G10 and global emerging markets.

Dr. Desai holds a Ph.D. in economics from Northwestern University, and earned a B.A. with honors from Delhi University in New Delhi.