

## 富蘭克林證券投資顧問股份有限公司 函

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受文者：香港商香港上海匯豐銀行股份有限公司台北分公司

發文日期：中華民國114年4月16日

發文字號：富顧字第1140000025號

速別：普通件

密等及解密條件或保密期限：

附件：共3件 (0000025\_附件3.pdf、0000025\_附件3\_2.pdf、0000025\_附件2\_2.docx、0000025\_附件2.docx、0000025\_附件.xlsx)

主旨：本公司業經主管機關核准之富蘭克林坦伯頓全球投資系列  
旗下兩檔基金英文名稱變更及其他修訂通知，請 查  
照。

說明：

一、富蘭克林坦伯頓全球投資系列－潛力歐洲基金之基金英文名稱變更、投資政策以及《永續金融揭露規範》重新分類進行修訂並將自2025年6月25日起生效。

本次異動對基金之管理方式、風險概況或收費均不會產生重大的影響。

二、富蘭克林坦伯頓全球投資系列－全球平衡基金之基金英文名稱變更、投資政策、全球曝險與基金指標修訂並將自2025年7月16日起生效。

本次異動對基金之管理方式、綜合風險及報酬指標或收費均不會產生重大的影響。

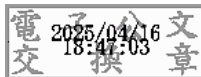
三、此函文非屬重大影響投資人事項。

#### 四、附件：

1. 基金名稱變更前後照表。
2. 股東通知信中譯版。
3. 股東通知信英文版。

正本：國泰世華商業銀行股份有限公司、華南商業銀行股份有限公司、法商法國巴黎銀行台北分公司、國泰綜合證券股份有限公司、中租證券投資顧問股份有限公司、王道商業銀行股份有限公司、臺灣銀行股份有限公司、合作金庫商業銀行、兆豐國際商業銀行股份有限公司、臺灣新光商業銀行股份有限公司、香港商香港上海匯豐銀行股份有限公司台北分公司、元大商業銀行股份有限公司、玉山商業銀行股份有限公司、上海商業儲蓄銀行股份有限公司、元大證券股份有限公司、統一綜合證券股份有限公司、臺灣土地銀行股份有限公司、渣打國際商業銀行股份有限公司、板信商業銀行股份有限公司、台中商業銀行股份有限公司、三信商業銀行股份有限公司、陽信商業銀行股份有限公司、台新國際商業銀行股份有限公司、永豐商業銀行股份有限公司、基富通證券股份有限公司、凱基證券股份有限公司、元富證券股份有限公司、永豐金證券股份有限公司、第一商業銀行股份有限公司、臺灣中小企業銀行股份有限公司、台北富邦商業銀行股份有限公司、高雄銀行股份有限公司、京城商業銀行股份有限公司、瑞興商業銀行股份有限公司、彰化商業銀行股份有限公司、遠東國際商業銀行股份有限公司、凱基商業銀行股份有限公司、星展(台灣)商業銀行股份有限公司、華泰商業銀行股份有限公司、中國信託商業銀行股份有限公司、安泰商業銀行股份有限公司、群益金鼎證券股份有限公司、兆豐證券股份有限公司、富邦綜合證券股份有限公司、鉅亨證券投資顧問股份有限公司、美盛證券投資顧問股份有限公司、富蘭克林華美證券投資信託股份有限公司、聯邦商業銀行股份有限公司、連線商業銀行股份有限公司

副本：



附件 基金名稱變更前後照表

基金更名生效日: 2025 年 6 月 25 日

| ISIN Code    | 變更前<br>基金中英文名稱                                                                                                        | 變更後<br>基金中英文名稱                                                                                                                 |
|--------------|-----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| LU0093666013 | Franklin Templeton Investment Funds -<br><b>Templeton Euroland Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金歐<br>元A(acc)股      | Franklin Templeton Investment Funds -<br><b>Templeton European Insights Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金歐<br>元A(acc)股      |
| LU0229941660 | Franklin Templeton Investment Funds -<br><b>Templeton Euroland Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金歐<br>元A(Ydis)股     | Franklin Templeton Investment Funds -<br><b>Templeton European Insights Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金歐<br>元A(Ydis)股     |
| LU1685355114 | Franklin Templeton Investment Funds -<br><b>Templeton Euroland Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金美<br>元避險A(acc)股-H1 | Franklin Templeton Investment Funds -<br><b>Templeton European Insights Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金美<br>元避險A(acc)股-H1 |
| LU1863844665 | Franklin Templeton Investment Funds -<br><b>Templeton Euroland Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金美<br>元A(Acc)股      | Franklin Templeton Investment Funds -<br><b>Templeton European Insights Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金美<br>元A(Acc)股      |
| LU1863844749 | Franklin Templeton Investment Funds -<br><b>Templeton Euroland Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金美<br>元A(Ydis)股     | Franklin Templeton Investment Funds -<br><b>Templeton European Insights Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 潛力歐洲基金美<br>元A(Ydis)股     |

基金更名生效日: 2025 年 7 月 16 日

| ISIN Code    | 變更前<br>基金中英文名稱                                                                                                                           | 變更後<br>基金中英文名稱                                                                                                                                   |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| LU0052756011 | Franklin Templeton Investment Funds -<br><b>Templeton Global Balanced Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 全球平衡基金美<br>元A(Qdis)股 (本基金之配息來源可能為本金) | Franklin Templeton Investment Funds -<br><b>Templeton Global Value and Income Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 全球平衡基金美<br>元A(Qdis)股 (本基金之配息來源可能為本金) |
| LU0128525689 | Franklin Templeton Investment Funds -<br><b>Templeton Global Balanced Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 全球平衡基金美<br>元A(acc)股 (本基金之配息來源可能為本金)  | Franklin Templeton Investment Funds -<br><b>Templeton Global Value and Income Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 全球平衡基金美<br>元A(acc)股 (本基金之配息來源可能為本金)  |
| LU2054478149 | Franklin Templeton Investment Funds -<br><b>Templeton Global Balanced Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 全球平衡基金美<br>元F(Qdis)股 (本基金之配息來源可能為本金) | Franklin Templeton Investment Funds -<br><b>Templeton Global Value and Income Fund</b><br>富蘭克林坦伯頓全球投資系列基金 - 全球平衡基金美<br>元F(Qdis)股 (本基金之配息來源可能為本金) |



富蘭克林坦伯頓全球投資系列基金  
Société d'investissement à capital variable  
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B.P. 169 L-2011 Luxembourg  
[www.franklintempleton.lu](http://www.franklintempleton.lu)

盧森堡，2025 年 4 月 16 日

## 富蘭克林坦伯頓全球投資系列基金之一檔子基金之變更修訂

親愛的股東，您好！

本信件旨在通知您，富蘭克林坦伯頓全球投資系列基金（以下稱「本公司」）之董事會已決定將富蘭克林坦伯頓全球平衡基金（Templeton Global Balanced Fund，以下稱「本基金」）的英文名稱變更為「**Templeton Global Value and Income Fund**」並對其投資政策、全球曝險與基金指標修訂如下：

### 「投資政策

本基金藉由主要投資於全球（包括新興市場）各國機構所發行的股票及政府債券來達成投資目標。

在一般市場狀況下，本基金投資於遍及全世界的債權及股權證券之多元化投資組合。投資經理公司預期將大部分的本基金的投資組合一般投資於具資本增值潛力之股票、或是股票連結證券，包括債券、或可轉換或可交換為股權證券的特別股。本基金更藉由投資於全球各國包括新興市場之政府、政府所屬相關機構或企業所發行的固定或浮動利率的債權證券（包括但不超過本基金淨資產的5%20%投資於非投資等級之證券）及債權憑證，以及投資經理公司認為具有不錯股利率的股票，以達到追求收益的目標。本基金亦可投資在由多國政府所組織或支援的跨國性組織，例如國際復興開發銀行或歐洲投資銀行所發行的債權憑證。本基金可能將不超過其淨資產的30%透過債券通或直接投資於中國銀行間債券市場(CIBM direct)方式投資於中國。本基金得購買股票、固定收益證券及債權憑證。儘管前面所述，投資經理公司不會將超過40%的淨資產投資於固定收益證券。

本基金也得為了避險目的以及、效率投組管理以及投資目的而運用金融衍生性商品。這些金融衍生性商品亦得於(i)受管轄市場交易，例如：期貨契約（包括政府證券的期貨契約）及選擇權，或是於(ii)櫃檯買賣市場交易，可能包括尤其是互換交易（例如信用違約互換交易、固定收益相關及股權總報酬互換交易）、貨幣遠期交易和交叉貨幣遠期交易、期貨契約（包括基於股票、股票指數、利率、貨幣及政府證券的期貨契約）、股權連結票券、股票指數選擇權以及選擇權（包括掩護性買權以及權證）。使用金融衍生性商品可能導致在特定收益曲線/存續期間、貨幣或是信用的負曝險部位。本基金得投資不超過其淨資產的10%於可轉讓證券集體投資企業（UCITS）及其他集合投資事業（UCIs）所發行的單位。此外，本基金得投資於股權證券、信用連結證券以及貨幣市場工具，並可能透過受管轄投資基金而有浮動利率貸款的曝險。例如：貨幣、匯率及利率相關的互換交易及遠期交易。

(續)

為了實現其投資目標和財務目的，本基金得依據所適用的投資限制持有大量的銀行存款、貨幣市場工具或是貨幣市場基金（最高可達其淨資產的 100%）。

本基金也得分派資本、已實現和未實現淨資本利得，以及未扣減費用之收益，其得允許較多的收益被分配而可能也有減少本金的影響。」

#### 總報酬互換交易曝險

本基金的投資政策亦加強闡明投資經理公司得投資於總報酬互換交易，並於本基金投資政策的最後加入以下段落：

「總報酬互換交易曝險：  
可能受總報酬互換交易(非融資性)影響之期望曝險水準相當於基金淨資產的 3%，最高不超過 5%。」

#### 全球曝險：

採用風險價值法(相對風險價值 relative VaR)計算本基金的全球曝險。

相對風險價值的參考指標是由摩根史坦利所有國家世界指數 ( MSCI All Country World Index ) ( 60% )、摩根大通全球政府債券指數 ( J.P. Morgan Global Government Bond Index ) ( GBI ) ( 20% )、摩根大通新興市場債券全球指數 ( J.P. Morgan Emerging Markets Bond Index Global ( EMBIG ) ) ( 10% ) 以及摩根大通新興市場當地貨幣公債指數 ( J.P. Morgan Government Bond Index-Emerging Markets ( GBI-EM ) ) ( 10% ) 所組成的混合指標。

本基金的期望槓桿水平應相當於 120%。期望槓桿水平僅是預估值，並且有可能須承受較高的槓桿水平。採用的水平計算方法為名目本金總額。此包含有關金融衍生性工具的名目本金曝險，但不包括本基金所持有的投資部位，該投資部位佔總資產的 100%。~~採用承諾法計算本基金的全球曝險。~~

此外，特別與本基金相關之「信用連結證券風險」、「重整公司風險」及「互換交易協定風險」將增列於「風險考量」項下。

最後，本基金指標將由「客製 65% 摩根史坦利所有國家世界指數+35% 摩根大通全球政府債券指數 (Custom 65% MSCI ACWI + 35% JP Morgan Global Government Bond Index)」變更為「客製 60% 摩根史坦利所有國家世界指數+40% 摩根大通全球政府債券指數 (Custom 60% MSCI ACWI + 40% JP Morgan Global Government Bond Index)」。

(續)

上述變動將從 2025 年 7 月 16 日起生效，並將反映在公開說明書的更新版本中，公開說明書的副本可在網上或本公司註冊辦事處提供。因應股東要求，本公司註冊辦事處可提供基金的 KID 草稿及 SFDR 銷售前揭露文件草稿。

### 影響

雖然本基金投資組合的組成及其風險概況將受到上述異動的影響，但預計不會對本基金的管理方式、綜合風險及報酬指標或收費產生重大的影響。與投資組合的組成再平衡相關的成本和費用將由本基金承擔。本基金的所有其他特徵保持不變。

### 您需要做什麼

如果您同意此變動，則無需採取任何行動。您也可以選擇將股份轉換至已在您的國家銷售之本公司任何其他子基金。您也可以要求贖回您的投資。無論您欲採取任一選項，請參閱最新的基金公開說明書條款。本公司將免費處理 2025 年 7 月 16 日前收到的此類轉換或贖回要求。

請注意，基於或有遞延銷售手續費（以下稱「CDSC」）之性質，「免贖回費」並不適用於須收取 CDSC 之所有股份類別。據此，若您決定贖回須收取 CDSC 之任何股份，將需支付適用的 CDSC，如公開說明書內更詳細地揭露。

### 需要更多資訊？

富蘭克林坦伯頓客戶服務團隊很樂意為您解答有關富蘭克林坦伯頓的任何常見問題。您只需致電當地的客戶服務團隊，或者造訪我們的網站 ([www.franklinresources.com/all-sites](http://www.franklinresources.com/all-sites) 或 [www.franklintempleton.lu](http://www.franklintempleton.lu))，若您需要投資建議，敬請不吝聯絡您的理財顧問。

我們感謝您選擇將您的投資交給富蘭克林坦伯頓基金集團。

順頌商祺！

(簽署)

Craig Blair，富蘭克林坦伯頓國際服務有限公司執行長  
富蘭克林坦伯頓全球投資系列基金之管理公司

(續)



請使用以下聯絡方式聯絡富蘭克林坦伯頓委託的股務代理機構/服務提供商的當地客戶服務團隊

**歐洲**

**法國**

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德國免付費號碼：08 00 0 73 80 02  
奧地利免付費號碼：08 00 29 59 11  
電子郵件：info@franklintempleton.de

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義大利免付費號碼：800.915.919  
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【簡譯中文，僅供參考】



富蘭克林坦伯頓全球投資系列基金  
Société d'investissement à capital variable  
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盧森堡，2025 年 4 月 16 日

## 富蘭克林坦伯頓全球投資系列基金之一檔子基金英文名稱變更、投資政策、績效指標及《永續金融揭露規範》重新分類之修訂

親愛的股東，您好！

本信件旨在通知您，富蘭克林坦伯頓全球投資系列基金（以下稱「本公司」）之董事會已決定因應投資人之需求，將富蘭克林坦伯頓潛力歐洲基金（Templeton Euroland Fund，以下稱「本基金」）從《永續金融揭露規範》（以下稱「SFDR」）第 6 條重新分類為該 SFDR 第 8 條項下之基金，並制定其 SFDR 的相關揭露，以便進一步整合環境、社會和公司治理 (ESG) 因素於投資流程以及強化本基金的約束性承諾。此外，本基金英文名稱將被更名為「Templeton European Insights Fund」及其投資政策將被修訂如下：

### 「投資政策：

為達成目標，本基金的投資政策主要是透過對股權及債權證券的投資於註冊成立或主要業務活動在歐洲國家的任何市值公司之股權證券，而證券發行單位為位於任一歐洲貨幣聯盟(歐元區國家)的會員國家的公司和政府，不管是否以歐元計價或是相關國家的通貨，以及任何其他發行公司以歐元計價的股票或債權證券。

投資經理公司也將環境、社會和公司治理 (ESG) 因素視為其基本投資研究和決策過程中不可或缺的組成部分。本基金所提倡的環境及/或社會特徵（在《SFDR》第 8 條含義內），詳見 [附錄 G]。

~~為符合法國法案 PEA 的規定，本基金將投資至少 75% 的淨資產於總公司設在歐盟的公司的股票。~~

由於具有彈性及可行性的投資政策較可能使本基金達成其投資目標，本基金可能在其他類型的可轉讓證券裡尋求投資機會，例如：特別股以及證券可轉換成任何前述公司發行的普通股等。

本基金也得小部份延伸投資於結構性商品，例如股票連結商品。

(續)



本基金也得為避險以及效率投資組合管理而運用金融衍生性商品。這些金融衍生性商品可能包括尤其是期貨契約（包括股票、股票指數、利率和貨幣的期貨契約）、遠期交易以及選擇權（包括在受管轄市場交易之股票選擇權、股票指數選擇權）。使用金融衍生性商品可能導致在特定資產類別、收益曲線/存續期間或是貨幣的負曝險部位。」

本基金的 SFDR 銷售前揭露文件將被納入公開說明書附錄 G，特別與本基金相關之「中小型公司風險」及「永續發展風險」將增列於「風險考量」項下，以及本基金的「投資人剖析」部分將更新如下：

「考量上述之投資目標，本基金可能訴諸以下投資人：

- 投資於符合 SFDR 第 8 條基金的投資人。
- 尋求藉由投資於歐洲貨幣聯盟會員國家價值被低估的股票來達成資本增值機會之投資人。
- 預計持有投資時間為中長期。」

最後，本基金指標將由摩根史坦利歐盟指數(MSCI EMU Index)變更為摩根史坦利歐洲指數(MSCI Europe Index)。

上述變動將從 2025 年 6 月 25 日起生效，並將反映在公開說明書的更新版本中，公開說明書的副本可在網上或本公司註冊辦事處提供。因應股東要求，本公司註冊辦事處可提供基金的 KID 草稿及 SFDR 銷售前揭露文件草稿。

### 影響

縱然本基金投資組合的組成將適度地受到上述異動的影響，但重新分類為 SFDR 第 8 條項下之基金預計不會對本基金目前的管理方式、風險概況或收費產生重大的影響。與投資組合的組成再平衡相關的成本和費用將由本基金承擔。本基金的所有其他特徵保持不變。

### 您需要做什麼

如果您同意此變動，則無需採取任何行動。您也可以選擇將股份轉換至已在您的國家銷售之本公司任何其他子基金。您也可以要求贖回您的投資。無論您欲採取任一選項，請參閱最新的基金公開說明書條款。本公司將免費處理 2025 年 6 月 25 日前收到的此類轉換或贖回要求。

(續)

請注意，基於或有遞延銷售手續費（以下稱「CDSC」）之性質，「免贖回費」並不適用於須收取 CDSC 之所有股份類別。據此，若您決定贖回須收取 CDSC 之任何股份，將需支付適用的 CDSC，如公開說明書內更詳細地揭露。

**需要更多資訊？**

富蘭克林坦伯頓客戶服務團隊很樂意為您解答有關富蘭克林坦伯頓的任何常見問題。您只需致電當地的客戶服務團隊，或者造訪我們的網站 ([www.franklinresources.com/all-sites](http://www.franklinresources.com/all-sites) 或 [www.franklintempleton.lu](http://www.franklintempleton.lu))，或是若您需要投資建議，敬請不吝聯絡您的理財顧問。

我們感謝您選擇將您的投資交給富蘭克林坦伯頓基金集團。

順頌商祺！

(簽署)

Craig Blair，富蘭克林坦伯頓國際服務有限公司執行長  
富蘭克林坦伯頓全球投資系列基金之管理公司

(續)

請使用以下聯絡方式聯絡富蘭克林坦伯頓委託的股務代理機構/服務提供商的當地客戶服務團隊

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Luxembourg, 16 April 2025

## Changes to one sub-fund of Franklin Templeton Investment Funds

Dear Shareholder,

We would like to inform you that the board of directors of Franklin Templeton Investment Funds (the “**Company**”) has decided to rename the Templeton Global Balanced Fund (the “**Fund**”) to “Templeton Global Value and Income Fund” and make amendments to the investment policy, global exposure and benchmark of the Fund as follows:

### **Investment Policy**

*The Fund seeks to achieve its objective by investing principally in equity securities and government debt securities issued by entities throughout the world, including Emerging Markets.*

Under normal market conditions, the Fund invests in a diversified portfolio of debt and equity securities worldwide. ~~The Investment Managers anticipate that the majority of the~~ Fund's portfolio is normally invested in equity or equity-linked securities, including debt or preferred stock convertible or exchangeable into equity securities, selected principally on the basis of their capital growth potential. The Fund seeks income by investing in fixed or floating-rate debt securities (including up to ~~520%~~ of the Fund's net assets in non-investment grade securities) and debt obligations issued by government and government-related issuers or corporate entities worldwide, including in Emerging Markets, as well as stocks the Investment Managers believe offer attractive dividend yields. The Fund may also purchase debt obligations issued by supranational entities organised or supported by several national governments, such as the International Bank for Reconstruction and Development or the European Investment Bank. The Fund can invest less than 30% of its net assets in Mainland China through the Bond Connect or directly (also referred to as CIBM direct). The Fund may purchase equities, fixed income securities and debt obligations. ~~Notwithstanding the foregoing, at no time will the Investment Managers invest more than 40% of the Fund's net assets into fixed income securities.~~

The Fund may also utilise financial derivative instruments for hedging ~~purposes, and~~ efficient portfolio management and investment purposes. These financial derivative instruments may be dealt ~~on either~~ on ~~(i) Regulated Markets, such as futures contracts (including those on government securities), as well as options or (ii) over-the-counter and may include, inter alia, swaps (such as credit default swaps, fixed income related and equity total return swaps), forwards and cross forwards, futures contracts (including those based on equity, equity index, interest rate, currency and government securities), equity linked notes, equity index options, as well as options (including covered calls and warrants). Use of financial derivative instruments may result in negative exposures in a specific yield curve/duration, currency or credit. The Fund may invest up to 10% of its net assets in units of UCITS and other UCIs. In addition, the Fund may invest in equity securities, credit-linked securities and money-market instruments~~ such as ~~currency, exchange rate, and interest rate related swaps and forwards.~~

(continued)

In order to achieve its investment goals and for treasury purposes, the Fund may hold or invest significant amounts in bank deposits, money market instruments or money market funds pursuant to the applicable investment restrictions (up to 100% of its net assets).

*The Fund may also make distribution from capital, net realised and net unrealised capital gains as well as income gross of expenses. Whilst this might allow more income to be distributed, it may also have the effect of reducing capital."*

### **Exposure to total return swaps**

The Investment Policy of the Fund is also enhanced to clarify that the investment managers may invest in total return swaps and the following paragraph is added at the end of the Fund's investment policy:

#### ***"Exposure to total return swaps***

*The expected level of exposure that could be subject to total return swaps (unfunded) amounts to 3% of the Fund's net assets, subject to a maximum of 5%."*

### **Global Exposure**

The Value-at-Risk approach (relative VaR) is used to calculate the Global Exposure of the Fund.

The relative VaR reference benchmark is a blended benchmark consisting of the MSCI All Country World Index (60%), the J.P. Morgan Global Government Bond Index (GBI) (20%), the J.P. Morgan Emerging Markets Bond Index Global (EMBIG) (10%) and the J.P. Morgan Government Bond Index-Emerging Markets (GBI-EM) (10%).

The Expected Level of Leverage for the Fund should amount to 120%. The Expected Level of Leverage is an estimate only and may be subject to higher leverage levels. The leverage calculation method used is the Sum of Notionals. It includes the notional exposure associated with financial derivative instruments but does not include the underlying investments of the Fund which make up 100% of total net assets. ~~The Commitment Approach is used to calculate the Global Exposure of the Fund.~~

In addition, "Credit-Linked Securities risk", "Restructuring Companies risk" and "Swap Agreements risk" will be added to list of risks which are particularly relevant for the Fund under section "Risk Considerations" sub-section of the fund.

Finally, the benchmark of the Fund will be changed from "Custom 65% MSCI ACWI + 35% JP Morgan Global Government Bond Index" to "Custom 60% MSCI ACWI + 40% JP Morgan Global Government Bond Index".

The above changes will become effective as from 16 July 2025 and will be reflected in an updated version of the Prospectus, a copy of which will be available online or at the registered office of the Company. Upon request of a shareholder, a draft KID and a draft of the SFDR precontractual disclosures of the Fund are available at the registered office of the Company.

(continued)

## Impact

While the portfolio's composition of the Fund and its risk profile will be impacted by the changes detailed above, it is not expected to have a significant impact on the way the Fund is managed, its SRI nor on the fees charged. The costs and expenses linked to the rebalancing of the portfolio's composition will be borne by the Fund. All other features of the Fund remain the same.

## What you need to do

You do not need to do anything if you are satisfied with the change. You also have the option to switch your shares into other funds of the Company provided that such funds are available for distribution in your country. You may also request a redemption of your investment. Should you wish to proceed with either option, please refer to the latest Prospectus terms. Such requests of switch or redemption will be executed free of charge, provided that they are received at the latest by 16 July 2025.

Please note that "free of any redemption charge" does not apply to the contingent deferred sales charge ("CDSC") for all classes subject to such CDSC, due to the nature of such fee. Accordingly, should you decide to redeem any shares subject to a CDSC, such redemption will be subject to the applicable CDSC as more fully disclosed in the Prospectus.

## Need more information?

Your dedicated Client Service Team will be happy to help with any general questions about Franklin Templeton. Just call your local Client Service Team, visit our websites (at [www.franklinresources.com/all-sites](http://www.franklinresources.com/all-sites) or [www.franklintempleton.lu](http://www.franklintempleton.lu)) or if you need advice about your investment please speak to a financial adviser.

We thank you for choosing to trust Franklin Templeton with your investments.

Best regards,



Craig Blair, Conducting Officer of Franklin Templeton International Services S.à r.l.  
Management Company of Franklin Templeton Investment Funds

*(continued)*



**Please use the below contact to reach your local Client Service Teams at the delegated Transfer Agent/Service Provider of Franklin Templeton.**

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Luxembourg, 16 April 2025

## **Change of name, investment policy, benchmark and SFDR reclassification of one sub-fund of Franklin Templeton Investment Funds**

Dear Shareholder,

We would like to inform you that the board of directors of Franklin Templeton Investment Funds (the “**Company**”) has decided, in light of investors’ demand, to have the Templeton Euroland Fund (the “**Fund**”) reclassified from Article 6 to Article 8 under the Sustainable Finance Disclosure Regulation (“**SFDR**”) and to create its SFDR related disclosures, in order to further integrate ESG factors into the investment process and to reinforce the Fund’s binding commitments. In addition, the Fund will be renamed “Templeton European Insights Fund” and its investment policy will be amended as follows:

### **“Investment Policy**

*The Fund seeks to achieve its objective primarily through a policy of investing in equity ~~and debt obligations~~ securities of companies of any market capitalisation incorporated or having their principal business activities of any issuer in a member country of the European Monetary Union (Eurozone countries) countries, including corporations and governments, whether denominated in euro or relevant national currency, and in stock or debt obligations denominated in euro of any other issuer.*

*The Investment Manager also considers Environmental, Social and Governance (ESG) factors as an integral component of its fundamental investment research and decision process. The Environmental and/or Social characteristics (within the meaning of Article 8 SFDR) promoted by the Fund are detailed in the Appendix G.*

*~~To ensure eligibility for the French Plan d'Epargne en Actions (PEA), the Fund invests at least 75% of its net assets in equity securities issued by companies which have their head office in the European Union.~~*

*Since the investment objective is more likely to be achieved through an investment policy that is flexible and adaptable, the Fund may seek investment opportunities in other types of transferable securities, such as preferred stock and securities convertible into common stock of any such issuers as described above.*

*The Fund may also invest to a lesser extent in structured notes such as equity-linked notes. The Fund may further utilise financial derivative instruments for hedging and efficient portfolio management. These financial derivative instruments may include, inter alia, futures contracts (including futures based on equity, equity index, interest rate and currency), forwards as well as options (such as equity options and equity index options dealt on Regulated Markets). Use of financial derivative instruments may result in negative exposure in a specific asset class, yield curve/duration or currency.”*

The SFDR precontractual disclosures for the Fund will be added to Appendix G of the Prospectus and “Smaller and Midsize Companies risk” and “Sustainability risk” will be

(continued)

added to the list of risks which are particularly relevant for the Fund under section “Risk Considerations” and the Investor Profile sub-section of the Fund will be updated as follows:

*“Considering the investment objectives, as stated above, the Fund may appeal to Investors looking to:*

- *[invest in a Fund compliant with Article 8 of the SFDR](#)*
- *capital appreciation by investing in undervalued equity securities issued by ~~the member~~ [European](#) countries ~~of the European Monetary Union~~*
- *invest for the medium to long term”*

Finally, the benchmark of the Fund will be changed from “MSCI EMU Index” to “MSCI Europe Index”.

The above changes will become effective as from 25 June 2025 and will be reflected in an updated version of the Prospectus, a copy of which will be available online or at the registered office of the Company. Upon request of a shareholder, a draft KID and a draft of the SFDR precontractual disclosures of the Fund are available at the registered office of the Company.

## Impact

While the portfolio’s composition of the Fund will be moderately impacted by the changes detailed above, the reclassification to Article 8 is not expected to have a significant impact on the way that the Fund is managed, its risk profile, nor on the fees charged. The costs and expenses linked to the rebalancing of the portfolio’s composition will be borne by the Fund. All other features of the Fund remain the same.

## What you need to do

You do not need to do anything if you are satisfied with the change. You also have the option to switch your shares into other funds of the Company provided that such funds are available for distribution in your country. You may also request a redemption of your investment. Should you wish to proceed with either option, please refer to the latest Prospectus terms. Such requests of switch or redemption will be executed free of charge, provided that they are received at the latest by 25 June 2025.

Please note that “free of any redemption charge” does not apply to the contingent deferred sales charge (“CDSC”) for all classes subject to such CDSC, due to the nature of such fee. Accordingly, should you decide to redeem any shares subject to a CDSC, such redemption will be subject to the applicable CDSC as more fully disclosed in the Prospectus.

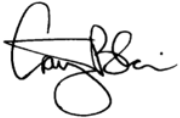
## Need more information?

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*(continued)*

We thank you for choosing to trust Franklin Templeton with your investments.

Best regards,

A handwritten signature in black ink, appearing to read 'Craig Blair', with a stylized, cursive script.

Craig Blair, Conducting Officer of Franklin Templeton International Services S.à r.l.  
Management Company of Franklin Templeton Investment Funds

*(continued)*

**Please use the below contact to reach your local Client Service Teams at the delegated Transfer Agent/Service Provider of Franklin Templeton.**

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