

+LJKHU (GXFDWLRQ (PHUJHQF\ 5HOLHI)XQG 5HS
)LQDQFLDO \$LG *UDQWV WR 6WXGHQWV

4XDUWHU (QGLQJ1RWH)XQGV DYDLODEOH LQ * RQ),1\$/

7ULDQJOH 7HFK 23(UHFHLYHGXQJUDQW DUGHG SXUVXDQW WR 6HF
5HVFXH 3ODQ \$FW RI \$53 XE / VXSSOHPHQWDO DZD
(GXFDWLRQ 'HSDUWPHQW JRYHUQHGE\ VHFWRQ RI WKH
DQG 5HOLHI 6XSSOHPHQWDO \$SSURSULDWLRQV \$FW &556\$
RI WKH 6XSSOHPHQWDO \$JUHHPHQW \$/1 4 D 3URJUDP

7KH \$PHULFDQ 5HVFXH 3ODQ \$FW \$53 DXWKRULJHG WKH 8
VXSSOHPHQWDO IRUPXOD JUDQW IXQGV WR SURSULHWDU\ SRVW
DGGUHVVLQJ VWXGHQW QHHGV UHODWHG WR FRURQDYLUXV

7KH LQVWLWXWLRQ DSSUHFLDWHV WKDW &RQJUHVV DQG WKH 3
VWXGHQWV LQFOXGLQJ VWXGHQWV H[FOXVLYHO\ HQUROOHG LQ
RI WKH VWXGHQWV FRVW RI DWWHQGDQFH RU IRU HPHUJHQF\
KRXVLQJ KHDOWK FDUH LQFOXGLQJ PHQWDO KHDOWK FDUH R

7KH LQVWLWXWLRQ LV PDNLQJ WKH EHORZ LQIRUPDWLRQ DYDL
)HGHUDO 5HJLVWHU SXEOLVKHG RQ 0D\ 'RFXPHQW 1XPEHU
DQG)5 SDJHV 'RFXPHQW 1XPEHU
UHJDUGLQJ WKLV)XQG 5HOLHI 6XSSOHPHQWDO \$SSURSULDWLRQV \$FW
[FZD\[WHU#WULDQJOH WHFK HGX](#)

7ULDQJOH 7HFK 23(VXEPLWWHG WR (' ERWK WKH \$PHULFDQ
6XSSOHPHQWDO \$JUHHPHQW \$/1 4 D DQG WKH &H
4 IRU WKH 6WXGHQWV DQG 3URJUDP WLFWRQ D RI WKH
5HOLHI 6XSSOHPHQWDO \$SSURSULDWLRQV \$FW &556\$\$
DQG UHTXLUHPHQWV RI ERWK WKH \$53 6XSSOHPHQWDO \$JU
\$JUHHPHQW & \$

7KH WRWDO DPRXQW RI IXQGV WKDW WKH LQVWLWXWLRQV SX
WR WKH LQVWLWXWLRQV 6XSSOHPHQWDO \$JUHHPHQW >IRU
\$53 D SURJUDP LV

7KH WRWDO DPRXQW RI HPHUJHQF\ ILQDQFLDO DQG JUDQW
DV RI WKH GDWH RI VXEPLWLRQ LV WULEXWHG ±

7KH HVWLPDWHG WRWDO QXPEHU RI VWXGHQWV (WKH JHQ
\$LG *UDQWV WR 6WXGHQWV XQGHU WKH \$53 D SURJUDP

7KH WRWDO QXPEHU RI VWXGHQWV ZKR KDYH UHFHLYHG DQ
LV 7KH QXPEHU DZDUGHG (PHUJHQF\)LQDQFLDO
KRZHYHU WKH WRWDO QXPEHU RI VWXGHQWV

7KH PHWKRGV XVHG E\ WKH LQVWLWXWLRQ WR GHWHUPLQH
*UDQWV DQG KRZ PXFK WKH\ ZRXOG UHFHLYH QVWDFWPHQW

\$Q\ LQVWUXFWLRQV GLUHFWLRQV RU JXLGDQFH SURYLGHG
(PHUJHQF\)LQDQFLDO \$LG \$UDQWV DQG SURJUDP

,Q 0D\ WKH 8 6 'HSDUWPHQW RI (GXFDWLRQ ³(' DQQRXQFHG DGGI
HGXFDFWLRQ WR VHUYH VWXGHQWV DQG HQVXUH OHDUQLQJ FRQWLQXHV
WKH +LJKHU (GXFDWLRQ (PHUJHQF\ 5HOLHI)XQG ,,, ³+((5) ,,, ' DQG ZDV

7R EH HOLJLEOH WR UHFHLYH +((5) ,,, 6WXGHQW 6KDUH *UDQW)XQGV
EHORZ ^3(OLJLEOH 6WXGHQW'

6WXGHQW KRYKDYH FRPSOHWHG D)UHH \$SSOLFDWLRQ IRU)HGHUDO 6WXG
)LQDQFLDO \$LG <H DU DQG KDYH DQ RIILFLDO ([SHFWHG)DPLO\ &RQWU
\$LG 'HSDUWPHQW EDVHG RQ WKDW)\$)6\$ 7ULDQJOH 7HFK KDV FRQFOX
ILQDQFLDO QHHG LV WR YHULI\ WK\ \$V \$V KDV VWXGHQW HGHUO FRPSOHWH
'6\$5' DQG KDV DQ RIILFLDO ()& RIILFLDO DUH \$V \$V HGHUO VV UHFHLYHG
E\ WKHLU 7ULDQJOH 7HFK)LQDQFLDO \$LG \$GYLVRU WR FRPSOHWH W
DSSRLQWPHQW QWV ZKR KDYH QRW ILOHG D)\$)6\$ ZLOO EH FRQVLGHU

\$FFRUGLQJ WR WKH 8 6 'HSDUWPHQW RI (GXFDWLRQ TV ('TV)LQDO
HQUROOHG DW DQ HOLJLEOH LQVWLWXWLRQ RQ RU DIWHU 0DUFK
,,, VWXGHQW JUDQWV \$FFRUGLQJ WR WKH +((5) ,,,)\$4V DQG WKH)LQ
VWXGHQW FRPSOHWHG D)\$)6\$ RU LV HOLJLEOH IRU 7LWOH ,9 IHGHUO
VWXGHQWV DQG IRU DOO WKUHH +((5) SURJUDPV

6WXGHQWV PXVW EH HQUROOHG DV RI -XQH IRU 6XPPHU V
2FWREHU IRU WKH)DOO VHPHVWHU IXQGV

6WXGHQWV PXVW VXEPLW D 7ULDQJOH 7HFK +((5) ,,, 6WXGHQW 6KDUH

QWHUQDWLRQDO XQGRFXPHQW HGHUO LQGHUO \$(\$)V,W,X,G,M,Q,W 6KDUH *

\$FFRUGLQJ WR WKH 8 6 'HSDUWPHQW RI (GXFDWLRQ TV ('TV)LQDO
DQG SHUPDQHQW UHVLGHQWV UHIXJHHV DV\OXP VHHNHUV 'HIHUUH
RWKHU '5(\$0HUV DQG VLPLODU XQGRFXPHQWHG VWXGHQWV DUH DOV
SURJUDPV 7KLV DOVR PHDQV WKDW VFRRROV FDQ DZDUG +((5) , +((
QRW HQUROOHG LQ 7LWOH ,9 HOLJLEOH SURJUDPV 7KLV LQFOXGHV O
VWXGHQWV VWXGHQWV ZKR DUH VLPXOWDQHRXVO\ HQUROOHG LQ KL
RU ZLWKGUDZQ DQG VR RQ

\$SSO\LQJ IRU D +((5) ,,, 6WXGHQW 6KDUH *UDQW

\$Q (OLJLEOH 6WXGHQW PD\ DSSO\ IRU D +((5) ,,, 6WXGHQW 6KDUH *U
ZLOO KDQG GHOLYHUHG WR WKH VWXGHQW RU H PDLOHG WR WKH VW
\$LG \$GYLVRU

%\ FRPSOHWLQJ WKL V DSSOLF DWLRQ , XQGHUVWDQG WKDW , D
(PHUJHQF\ 5HOLHI)XQG ,,, +(5) ,,, XQGHU WKH \$PHULFDQ 5H

