

IDEA JOINS GIVE AS ACTIVE ETFs LIST ON ASX



PERPETUAL ASSET MANAGEMENT
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Perpetual Asset Management Australia (PAMA) has launched the first and second of a suite of Exchange Traded Managed Funds (ETMFs) – commonly referred to as active ETFs – as the Perpetual Global Innovation Share Fund joined the Perpetual Ethical SRI Fund in trading on the ASX. The launch of active ETFs is aligned with our strategy to offer investors an additional channel to access Perpetual’s proven active management expertise.

The Perpetual Ethical SRI Fund (ASX: GIVE) commenced trading on the ASX on Monday, 29 November, providing ease of access for investors seeking an actively managed portfolio. GIVE was the first of a suite of active ETFs Perpetual intends to launch and was followed by the Perpetual Global Innovation Share Fund (ASX: IDEA) on 13 December. Both GIVE and IDEA are a unit class of their respective managed fund, utilising the same investment strategy of the applicable fund.

Commenting on the launch, Amanda Gillespie, Group Executive Perpetual Asset Management Australia said: “We have been looking forward to bringing Active ETFs to market, providing contemporary investment solutions to meet the evolving needs of our clients. The launch of Active ETFs is aligned with our strategy to invest in new capabilities and offer investors an additional channel (via the ASX) to access Perpetual’s proven active management expertise.”

As the ETF market continues to grow, we expect investors will increasingly look towards ETFs that offer the benefits of active management when constructing their portfolios. PAMA’s debut into the ETF space expands the choice for retail investors and their advisers when seeking exposures to a portfolio of actively managed Australian and global shares, backed by experienced and specialist investment teams.

GIVE was the first cab off the rank as investor interest is driving growth in sustainable investment strategies as Australians are increasingly seeking to invest their savings in companies with a demonstrated commitment to environmental, social and governance (ESG) principles. Research conducted by Perpetual shows 25% of Australians try to invest in companies that are not harmful to the environment and society, and 24% of Australians are actively looking to invest in companies that are beneficial to

the environment and society.^[1]

As a long-standing ethical fund with a 20-year history in the Australian market, the Perpetual Ethical SRI Fund, managed by [Portfolio Manager Nathan Hughes](#), is now more accessible for investors through the launch of GIVE. The Perpetual Ethical SRI Fund aims to meet the needs of investors who seek long-term returns by investing in companies that are consistent with investors' social, environmental, and ethical preferences. The intention is to donate a portion of the performance fee from GIVE to charity, with the purpose of providing support and delivering positive impact to the community.

Next to be launched was IDEA, a unit class of the Perpetual Global Innovation Share Fund, which is focused on disruption and innovation and managed by portfolio manager Thomas Rice. Companies are disrupting established business models across a range of sectors as creating possibilities not considered possible just a few years ago. The Fund has a strong focus on understanding new innovations early and providing the opportunity to exploit market inefficiencies to find undervalued and underappreciated companies.

The Perpetual Global Innovation Share Fund is designed to provide investors with long-term capital growth by investing in a hand-picked portfolio of shares in global companies that are benefiting from changes in technology and innovation. It is managed with the belief that the market is often inefficient at pricing companies where rapid change is occurring.

“We are excited by both the Perpetual Ethical SRI Fund and the Perpetual Global Innovation Share Fund’s continued growth through the launch of GIVE and IDEA”, added Amanda Gillespie. “The launch of these capabilities in an ASX quoted structure provides investors the ability to benefit from Perpetual’s active management approach, underpinned by deep investment research and insights, and to gain access to key themes of responsible investing and global innovation.”

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