



CASE STUDY: OPHIR & PERPETUAL – A PARTNER, NOT A SERVICE PROVIDER



PERPETUAL CORPORATE TRUST
22/05/2019

Ophir Asset Management (Ophir) is a specialist small and mid-cap equities investment manager, who manage over 1bn in capital on behalf of their investors. In this video Rob Saunders, Investment Director & Head of Sales at Ophir Asset Management, discusses what they were looking for in a responsible entity when moving their Ophir High Conviction Fund (Fund) to a registered scheme.

While Ophir scoped the market for a number of different providers, Ophir Asset Management chose to partner with Perpetual due to the reputation of the brand and ability to generate good outcomes for their clients.

Saunders says they were pleased with how Perpetual Corporate Trust helped Ophir through the process of moving their Fund to a registered scheme and ensuring they had the best possible outcome for investors. Saunders states “Our business is centred around partnership, we view them (Perpetual) as an investment partner in our business. We feel that a partnership can continue to grow.”