

Perpetual named Fund Manager of the Year

By Perpetual Asset Management

29 November 2022



Perpetual Asset Management has again been recognised for its strong investment culture by taking out the top gong at the Lonsec 2022 Fund Awards. This caps a stellar year for the team after Perpetual Asset Management Australia was also recently named Fund Manager of the Year at the Zenith 2022 Fund Awards for the second year in a row.

Lonsec and SuperRatings named Perpetual Asset Management the winner of this year's Manager of the Year at an awards ceremony in Melbourne in late October. Perpetual's Multi Asset team also took home the award in the category of Multi Asset Fund of the Year for the Perpetual Diversified Real Return Fund. Lonsec said Perpetual Asset Management had taken the top spot in recognition of its well-established investment philosophy and process, as well as a long standing and strong investment culture.

"Perpetual Asset Management has been committed to its investment style and maintained its approach through multiple investment cycles. It has also broadened its exposure across asset classes and built out its focus on ESG," said Lonsec Research Executive Director, Lorraine Robinson.

Michael O'Dea and the Multi Asset Team were chosen as category winners for their highly experienced and credentialed investment team, disciplined asset allocation framework and successful focus on reducing volatility and drawdowns.

"It's a tremendous honour to be awarded both the Lonsec Fund Manager of the Year and the Lonsec Multi Asset Fund of the Year, being recognised for our true-to-label approach, broadened investment management capabilities and ESG credentials," said Amanda Gillespie, Perpetual Asset Management Australia Group Executive.

This achievement caps an excellent year for Perpetual Asset Management Australia, which was also recently named Fund Manager of the Year at the Zenith 2022 Fund Awards for the second year in a row. Perpetual Asset Management Australia also won the Multi Asset - Real Return category for a fourth consecutive year and was a finalist in the Australian Equities - Alternative Strategies category.

Further recognition came from Morningstar Australia earlier in the year when the independent research house awarded the <u>Perpetual Diversified Real Return Fund</u> the Australian Fund Manager of the Year - Multisector Category, Australia 2022. "Award winners are determined by a combination of qualitative research by Morningstar's manager research analysts; risk-adjusted medium- to long-term performance track records; and performance in the 2021 calendar year."

Also recognised this award season was the <u>Perpetual Smaller Companies Fund</u>, which was named Best Australian Small Companies Manager at the Australian Fund Manager Awards. This was great recognition for portfolio managers Jack Collopy and Alex Patten as well as the team.

Find out more more about Perpetual's suite of Investment products.

This information has been prepared by Perpetual Investment Management Limited (PIML) ABN 18 000 866 535, AFSL 234426. It is general information only and is not intended to provide you with financial advice or take into account your objectives, financial situation or needs. You should consider, with a financial adviser, whether the information is suitable for your circumstances. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information. Past performance is not indicative of future performance. The awards referred to above are determined using proprietary methodologies. Awards are solely statements of opinion and do not represent recommendations to purchase, hold or sell any securities or make any other investment decisions. Awards are generally current for 12 months from the date awarded and are subject to change at any time. Awards for previous years are referenced for historical purposes only.

The product disclosure statement (PDS) and Target Market Determination for the relevant funds, issued by PIML, should be considered before deciding whether to acquire or hold units in the Fund. The PDS can be obtained by calling 1800 022 033 or visiting our website www.perpetual.com.au.

The information is believed to be accurate at the time of complication and is provided in good faith. This document may contain information contributed by third parties. PIML and PSL do not warrant the accuracy or completeness of any information contributed by a third party. Any views expressed in this document are opinions of the author at the time and do not constitute a recommendation to act. This information, including any assumptions and conclusions is not intended to be a comprehensive statement of relevant practise or law that is often complex and can change. No company in the Perpetual Group (Perpetual Limited ABN 86 000 431 827 and its subsidiaries) guarantees the performance of any fund or the return of an investor's capital.

The Zenith Fund Awards were issued on 14 October 2022 by Zenith Investment Partners (ABN 27 130 132 672, AFSL 226872) and are determined using proprietary methodologies. The Fund Awards are solely statements of opinion and do not represent recommendations to purchase, hold or sell any securities or make any other investment decisions. To the extent that the Fund Awards constitutes advice, it is General Advice for Wholesale clients only without taking into consideration the objectives, financial situation or needs of any specific person, including target markets where applicable. Investors should seek their own independent financial advice before making any investment decision and should consider the appropriateness of any advice. Investors should obtain a copy of and consider any relevant PDS or offer document before making any investment decisions. Past performance is not an indication of future performance. Fund Awards are current for 12 months from the date awarded and are subject to change at any time. Fund Awards for previous years are referenced for historical purposes only.

For important information regarding Lonsec ratings and awards please visit: https://www.lonsec.com.au/logo-disclosure.

Morningstar Awards 2022 (c). Morningstar, Inc. All Rights Reserved. Awarded to Perpetual Diversified Real Return for Australian Fund Manager of the Year, Multisector, Australia.