

PERPETUAL INVESTMENTS

WHO WE ARE

Perpetual Investments is one of Australia's most highly regarded and awarded investment managers, with an enduring passion for protecting and growing our clients' wealth. We offer a broad range of investment options to individuals, advisers and institutions across Australian and global shares, multi asset investments, and credit and fixed income strategies.

INVESTMENT CAPABILITIES

AUSTRALIAN EQUITIES	\$15.4 BILLION*
 <p>Capture the growth and income potential of Australian shares and benefit from the size and depth of our Australian Equities team with an average of 19 years' investment management experience.</p>	
GLOBAL EQUITIES	\$1.3 BILLION*
 <p>Global shares provide diversification in an investment portfolio and give you exposure to the companies and industries that we believe may be under-represented in Australia.</p>	
CREDIT & FIXED INCOME	\$8.7 BILLION*
 <p>Benefit from investments that can deliver capital stability, income and liquidity. Our experienced Credit and Fixed Income team has a rigorous investment process with proven results through different market cycles, with the senior portfolio managers working together for over a decade.</p>	
MULTI ASSET STRATEGIES	\$2.6 BILLION*
 <p>Strong strategic and tactical asset allocation - our multi asset funds invest across a diverse range of investment opportunities, including domestic and global shares, credit and fixed income, cash, property, infrastructure and a range of other investments all combined within a single fund.</p>	

FOCUSING ON TRUE VALUE

Our disciplined investment process has been tested and proven for more than 50 years. We actively manage the investments of our clients based on fundamental research and analysis. Our aim is to choose the best quality investments at prices that represent good value, based on their potential risk and return. Our investment decisions are driven by rigorous company research, which includes more than 1,000 company meetings or calls per year.

To augment this process, we constantly invest in the quality and depth of our team. Today we have a large, dedicated and highly regarded team, with extensive investment management experience.

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GOLD WINNER

of Money Magazine's 2018 Best of the Best awards for Fund Manager of the Year

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KEY CAPABILITIES

Australian equities, global equities, credit and fixed income, multi asset strategies

50+
years

TESTED & PROVEN

investment process

125+
years

PROTECTING & GROWING

clients' wealth

1,000+

COMPANY VISITS

undertaken annually

\$26.3
billion

FUNDS

under management*

AWARD WINNING ASSET MANAGEMENT

Consistent delivery has seen Perpetual Investments receive significant industry recognition:

- Gold winner of *Money Magazine's* 2018 Best of the Best awards for **Fund Manager of the Year**.
- Gold winner of *Money Magazine's* 2017 Best of the Best awards for **Best Australian Share Funds – Perpetual Wholesale Ethical SRI Fund** and **Perpetual Wholesale SHARE-PLUS Long-Short Fund**.
- Winner of the **Responsible Investments** category, 2016 Money Management/Lonsec Fund Manager of the Year, for the second consecutive year.

- Gold winner of the 2016 Money Magazine's Best of the Best award for **Best Australian Share Fund**, for the second consecutive year.
- Winner of the **SMA Portfolio Award** at 2015 Money Management/Lonsec Fund Manager of the Year Awards.

COMMITTED TO RESPONSIBLE INVESTMENT

Perpetual has a long-standing commitment to responsible investment. In 2009, we became a signatory to the United Nations-supported Principles for Responsible Investment. This commits us to incorporate environmental, social and governance factors into our core investment processes.

In addition, we also offer a suite of specialist Ethical SRI funds across Australian Equities and Credit and Fixed Income, which may more closely align to investors' own personal social, environmental and ethical preferences.

DESIGNATED MANAGER, LISTED INVESTMENT VEHICLES

For those investors who prefer to invest in listed vehicles, we offer access to our investment expertise in both equity and credit and fixed income strategies, managing in excess of \$800 million[†] in listed vehicles available on the ASX.

*Source: Perpetual. As at 31 December 2019. Please note that in line with our continuous disclosure requirements, FUM figures can only be provided quarterly. Excludes monies managed by external managers. Includes the allocation of FUM from other asset classes.

† Source: Perpetual. As at 31 December 2019.

This content 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. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information. FD20362 3008_0220

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