

Perpetual Investments

THE VALUE OF LONG-TERM INVESTING

Building wealth by investing
over the long term

Perpetual 

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LONG-TERM INVESTING

Whenever there is short-term market volatility, investors can tend to get caught up in the momentum and noise of it all, leading some to make irrational decisions based on emotion. Historical market performance clearly shows that successful investing really is a long-term proposition.

Taking a longer-term view means you are able to more easily ride out any ups and downs and achieve a more consistent return.

Considering your investment timeframe when choosing your investments can help to preserve capital over the short term and help smooth out returns over the long term. History shows that investors who hold well-diversified portfolios of quality assets over longer time periods tend to do much better than those who try to add value by timing markets.

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, credit and fixed income strategies.

INVESTMENT CAPABILITIES

AUSTRALIAN EQUITIES

\$12.6 BILLION*



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 18 years of investment management experience.

CREDIT AND FIXED INCOME

\$8.4 BILLION*



Benefit from investments that can deliver capital stability, income and liquidity. Our experienced Credit and Fixed Income team has delivered through different market cycles, with the senior portfolio managers working together for over a decade.

MULTI ASSET STRATEGIES

\$2.4 BILLION*



Strong strategic and tactical asset allocation – our multi asset funds invest across a diverse range of investment opportunities, such as domestic and global shares, credit and fixed income, cash, property, infrastructure and a range of other investments all combined within a single fund.

GLOBAL EQUITIES

\$1.1 BILLION*



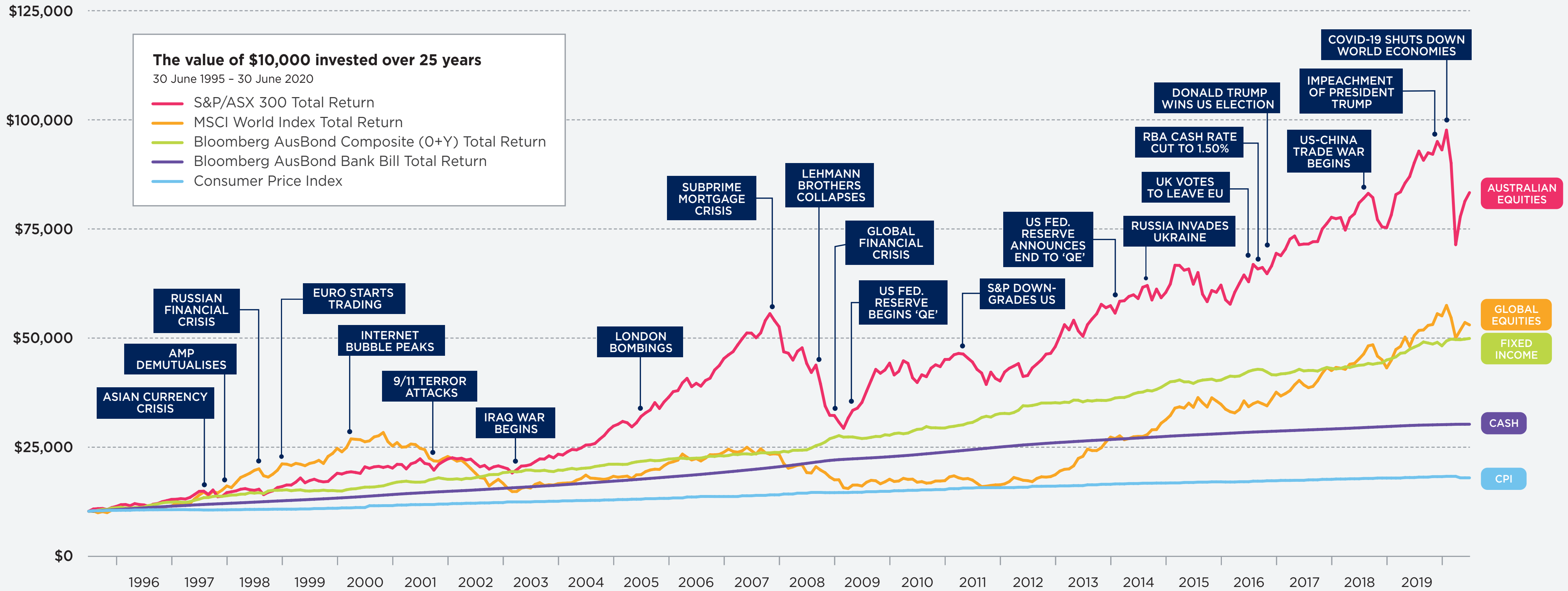
Global Global shares provide diversification in an investment portfolio and give you exposure to the companies and industries that we believe may be under-represented in Australia.

FOCUSING ON TRUE VALUE

Our disciplined investment process has been tested and proven for more than 50 years. We actively manage investments 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.

*Source: Perpetual. As at 30 June 2020. 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.



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Source: FactSet and Perpetual Investments | Past performance is not indicative of future performance.



PERPETUAL INVESTMENTS

New South Wales

Angel Place
Level 18
123 Pitt Street
Sydney NSW 2000

Australian Capital Territory

Level 6
10 Rudd Street
Canberra ACT 2601

Queensland

Central Plaza One
Level 15
345 Queen Street
Brisbane QLD 4000

South Australia

Level 11
101 Grenfell Street
Adelaide SA 5000

Victoria

Level 29
South Tower Rialto
525 Collins Street
Melbourne VIC 3000

Western Australia

Exchange Plaza
Level 29
2 The Esplanade
Perth WA 6000

If you would like more information about the value of long-term investing, talk to your financial adviser or visit www.perpetual.com.au

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MORE INFORMATION

Adviser Services 1800 062 725
Investor Services 1800 022 033
Email investments@perpetual.com.au
www.perpetual.com.au

