

Ausbil Australian Geared Equity Fund

Fund Information

November 2017

Ausbil Investment Management Limited
ARSN 124 196 621
APIR AAP0008AU
MFund AXW04

'Ausbil's Australian Geared Equity Fund¹ is a version of Ausbil's Australian Active Equity Fund, but offers investors the potential to maximise returns through internal gearing of up to 55%.'

Investment aim

The Fund aims to provide investors with long-term capital growth through borrowing (gearing) to invest in quality Australian shares.

Key features of the strategy

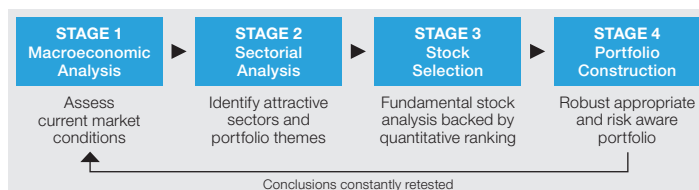
- invest in 30-40 quality Australian shares
- uses internal gearing to maximise returns
- the process favours companies with positive earnings and earnings revisions
- aims to provide investors with long-term capital growth
- level of dividends must be higher than the interest cost associated with borrowing and management fees

Key benefits of the strategy

- exposure to quality industrial and resource shares
- managed by Ausbil's skilled and multi-award-winning investment team
- offers access to gearing for superannuation investors
- high level of franking credits relative to an ungeared Portfolio

Investment style

We classify ourselves as 'core'; wherein at certain stages of the cycle the portfolio may have a value or growth tilt as markets provide opportunities for particular types of stocks to enjoy earnings growth. Ausbil employs a four-stage process to provide the framework for portfolio construction consistent with its investment philosophy. The process is summarised in the diagram below:



1. Ausbil Australian Geared Equity Fund (AAP0002AU).

Meet the manager

Paul Xiradis has over 38 years of financial services experience with companies such as Westpac Banking Corporation's Investment Management Division, ercantile & General and Legal & General Asset Management. Paul's career includes senior roles in management, investment management and portfolio management in the funds management industry.



In 1997, Paul co-founded Ausbil where he now holds the position of Executive Chairman, CIO and Head of Equities, where he has been instrumental in building the funds under management to over \$10 billion. Paul's role includes strategy, portfolio construction and input into the investment management of Ausbil's funds. Paul is a member and Chairman of Ausbil's Portfolio Construction Committee.

Contact Us

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