

Ausbil Australian Emerging Leaders Fund

Fund Information

March 2016

Ausbil Investment
Management Limited
ARSN 124 196 621
APIR AAP0104AU

'The Ausbil Australian Emerging Leaders Fund¹ is a concentrated portfolio of mid and small cap Australian shares, which possess potential for superior growth.'

Investment aim

The Fund aims to out-perform the benchmark over the medium to long term. The Strategy invests in a Portfolio of listed Australian equities that are primarily chosen from the S&P/ASX 300 Index, but generally exclude securities from the S&P/ASX 50 Leaders Index.

Key features of the strategy

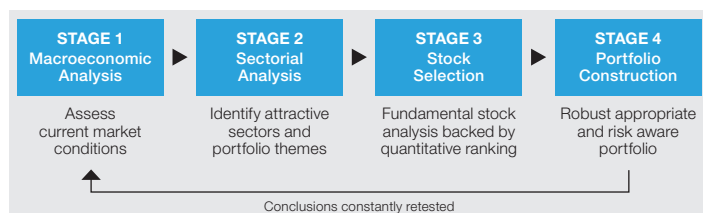
- invest in 30-40 quality mid to small cap Australian shares
- process favours companies with positive earnings and earnings revisions
- aims to provide investors with long-term capital growth

Key benefits of the strategy

- exposure to quality industrial and resource shares
- managed by Ausbil's skilled and multi-award-winning investment team
- access to mid to small cap securities that may not be researched by major broking houses

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 Investment Trusts - Emerging Leaders Fund (AAP0104AU).

Meet the manager

John Grace has over 25 years of financial services experience with companies such as McNall & Hordern (Sydney), Cazenove & Co (London), Royal Insurance Asset Management (London) and Legal & General Asset Management (Sydney). John's career includes senior roles in management, stock broking, investment management and portfolio management in the funds management industry.



John's initial grounding in equity analysis came through positions with stockbroking firms McNall & Hordern in Sydney and Cazenove & Co in London. Whilst in the United Kingdom, John became Portfolio Manager for Royal Insurance Asset Management with responsibility for Asia Pacific Funds. Back in Australia after five years in London, John joined Legal & General Asset Management as Senior Portfolio Manager. In 2001, John moved to Ausbil where he now holds the position of Co-Head of Equities. John's role includes strategy and portfolio construction, as well as input into the investment management of the Fund. John is a member of Ausbil's Portfolio Construction Committee.

Contact Us

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