

MEDIA RELEASE

10 September 2020

BT Approves Ausbil Active Sustainable Equity Fund for Platforms

Ausbil are pleased to announce that BT has approved the Ausbil Active Sustainable Equity Fund (Fund) for the BT Panorama and BT Wrap super platforms and investment menus.

“We are grateful for the support shown by BT in recognising the Fund on their platform,” said Hik Chadirchi, National Manager, Wholesale Clients, “Sustainable investing is one of the fastest growing segments in the market and clients are increasingly looking to add purpose to their returns,” said Chadirchi.

Ausbil has been a signatory to the PRI since 2016, and has recently been recognised for sustainable investing as: winner of the 2020 Lonsec Super Ratings Sustainable Investment Awards; a finalist for Fund Manager of the Year Awards 2020 for the Responsible Investment Category; and holds a Recommended rating from both Lonsec and Zenith.

“We approach sustainable investing through engagement with the universe of investable companies so we know more about them and can assess their true sustainability,” said Nicholas Condoleon, Portfolio Manager for the Fund, and Ausbil’s Head of Research.

“We have been focused on ESG for many years and it is all pervasive in our approach to fundamental valuation and security selection which we believe has contributed to our performance”.

The latest performance table of the Ausbil Active Sustainable Equity Fund

Period	1 month %	3 months %	6 months %	FYTD %	CYTD %	1 year %	2 years (pa) %	Since Inception (pa) %
Fund	5.18	11.65	4.88	7.85	3.15	6.96	7.11	8.73
S&P ASX 200	2.83	6.04	-4.48	3.35	-7.43	-5.08	1.74	4.30
Excess Return	+2.35	+5.61	+9.36	+4.51	+10.58	+12.04	+5.37	+4.43

As at 31 August 2020. Figures shown are net of fees and before taxes. Inception date is 31 January 2018.

The Ausbil Active Sustainable Equity Fund is now available on both the BT Panorama and BT Wrap platforms, listed in the options menu. The Fund is also available on AMP North, Macquarie Wrap, Netwealth, Hub24 and ASX mFund.

Ausbil’s leadership in the ESG space is evident in the associations with which we collaborate for change, and in the major volume of active company engagement we undertake each year, as summarised in our annual ESG report: read the Ausbil Annual ESG Advocacy and Engagement Report [here](#).

More information

For more information on the Ausbil Active Sustainable Equity Fund, please visit the Fund’s home page at www.ausbil.com.au.

About Ausbil Investment Management

Ausbil is a leading Australian based investment manager. Established in April 1997, Ausbil’s core business is the management of Australian and global equities for major superannuation funds, institutional investors, master trust and retail clients. Ausbil is owned by its employees and New York Life Investment Management a wholly-owned subsidiary of New York Life Insurance Company. As at 31 August 2020, Ausbil manage over \$11.8 billion in funds under management.

About Ausbil Active Sustainable Equity Fund

The Fund provides exposure to an actively managed portfolio, predominantly made up of listed Australian equities which meet Ausbil’s sustainability approach to investing. The Fund invests in a portfolio of listed Australian companies which are primarily selected from the S&P/ASX 200 Index, that have a relatively good sustainability profile, and are not subject to long term earnings sustainability risk.



ENDS

Signatory of:



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