

# MEDIA RELEASE

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## Ausbil celebrates 25 years in funds management

Ausbil Investment Management is proud to announce that it has achieved the milestone of 25 years in investment management. Founded in April 1997, Ausbil now manages over \$16.9 billion (as at 31 March 2022) in active Australian and global equity investments. Ausbil's investment team comprises 33 investment professionals including a chief economist who directs Ausbil's macro view, a leading ESG research team, and a strategic partnership with Fortune 100 company, New York Life.

Deploying its 'core' investment style and headed by Paul Xiradis, Chairman and Head of Equities, Ausbil has built an outstanding track record in large cap Australian Equities delivering +11.5% p.a with an excess return of +3.0% p.a (gross of fees) since inception in 1997. Capitalising on this strength, in more recent years, Ausbil has successfully introduced Concentrated, 130/30 Active Extension, Dividend Income, Active Sustainable and Long Short investment strategies.

Ausbil has also developed an outstanding Australian Mid and Small Cap business headed by John Grace, Co-Head of Equities. It includes 'Emerging Leaders' (ex 50) established in 2002, 'MicroCap' (ex 200) established in 2010 and 'SmallCap' (ex 100) established in 2020.

"We have invested through many ups and downs and the consistent application of our earnings and earnings revision process has served us well. Probably though, the most significant trend we have seen is the shift to responsible investing and ESG," says Xiradis. "Now, more than any time in the past, sustainable factors are forefront in the minds of investors".

In more recent years, under the leadership of Ross Youngman, CEO, Ausbil has set up global investment strategies so as to better fulfil client portfolio requirements and to enable the organisation to capture client interest in global regions such as the US, UK, Europe and the Middle East.

"Investment management is a global business and although we have offshore clients in Australian equities, we wanted to extend the brand further. Ausbil's inherent stability and investment platform has been the perfect launching board for our global teams. Now that we're through the initial 3 years, momentum is impressive, and the New York Life distribution footprint is kicking in for us."

Ausbil now has over a 3-year track record in Global Essential Listed Infrastructure, Global SmallCap and Global Resources Long Short. Each strategy is managed by a dedicated, stand-alone investment team.

"If I shared one insight from my last 25 years in investment management, I would say that, first and foremost, it is the people that matter most to investing successfully," says Xiradis. "I am proud of the track record produced by our investment team alongside the ever-reliable support of our business services and distribution teams. It's a team effort, no doubt about it".

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### 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 March 2022, Ausbil managed over \$16.9 billion in funds under management. Ausbil's ESG team is a leader in the marketplace which has contributed significantly to the development and expansion of ESG considerations in the Australian market. Ausbil is a signatory to the Principles of Responsible Investing (PRI). Ausbil collaborates actively with RIAA, IGCC, Climate 100+, and is currently chair of the RIAA Human Rights Working Group. Ausbil has integrated ESG in the investment decision making across all funds and investment mandates.

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