

MEDIA RELEASE

2 April 2025

Lonsec upgrades rating for Ausbil Global SmallCap Fund to 'Recommended'

Lonsec, a leading investment research and ratings provider, has announced the upgrade of the Ausbil Global SmallCap Fund (**Fund**) to 'Recommended' following a comprehensive review. This positive rating reflects the Fund's strong performance, experienced management team, and differentiated investment approach that sets it apart from its peers.

According to Lonsec's report, the "Co-Portfolio Managers bring a wealth of experience and a deep understanding of the global small-cap market. Their alignment with the Fund's objectives ensures a cohesive and focused investment strategy."

Managed by Simon Wood and Tobias Bucks, the Ausbil Global SmallCap Fund aims to exploit the inefficiencies within the asset class by investing in quality companies with unrecognised growth potential at attractive valuations.

"We are delighted with Lonsec's upgrade of the Ausbil Global SmallCap Fund to Recommended," said Mark Knight, CEO at Ausbil.

"This recognition underscores Ausbil's commitment to delivering superior returns for our investors through a disciplined and differentiated investment approach. We believe this upgrade will further strengthen our position in the market," Knight added.

Launched in May 2018, the investment strategy uses both qualitative and quantitative analysis and tools alongside a disciplined risk management process, with the aim of producing consistent and risk-controlled outperformance. The Fund's universe is the 23 developed markets that comprise the MSCI World Small Cap Index.

The Ausbil Global SmallCap Fund is available on Asgard, BT Panorama, CFS Edge, Hub 24, MLC Expand, Macquarie Wrap, Mason Stevens, mFund, Netwealth, North and Praemium.

ENDS

More information

For more information about the Ausbil Global SmallCap Fund, please visit the Fund's product page at www.ausbil.com.au

For further information or to schedule an interview please contact:

Natasha Moldrich Senior Consultant at Honner Tel: +612 8248 3740

Mob: +61 (0)404 863 267

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 indirectly by New York Life Insurance Company. As of 28 February 2025, Ausbil has over \$19.5 billion in funds under management. For more information, visit www.ausbil.com.au

Ausbil Investment Management Limited ACN 076 316 473 AFSL 229722 Level 27 225 George Street Sydney NSW 2000 GPO Box 2525 Sydney NSW 2001 Phone 61 2 9259 0200

This release is intended for information only. Unless otherwise specified, any information contained in this release is current as at the date of this release and is prepared by Ausbil Investment Management Limited (ABN 26 076 316473 AFSL 229722) (Ausbil). The information provided in this release is factual and does not constitute financial product advice. The information should not be copied, reproduced or redistributed without the prior written consent of Ausbil. The rating published on 03/2025 for AAP8285AU is issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). Ratings are general advice only and have been prepared without taking account of investors' objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The rating is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and Lonsec Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2025 Lonsec. All rights reserved.