



Media Release

Perpetual launches Ethical SRI Credit Fund

Thursday 14 June 2018

Perpetual has launched the Perpetual Ethical SRI Credit Fund ('the Fund') to meet investor demand for a diversified portfolio of ethical, socially responsible fixed income assets.

Portfolio Manager and Head of Fixed Income, Vivek Prabhu, said, "This is a new investment strategy that meets the demands of our clients. It is one of the first floating rate credit funds in Australia combining a social responsibility lens and investment performance.

"This Fund will appeal to investors with strict social and ethical considerations including not for profit organisations. It complements our strong heritage and track record in ethical, socially responsible investments."

The Fund will leverage the key strengths and experience of Perpetual's Credit and Fixed Income team. It will invest in high quality debt securities that have passed through an ethical and socially responsible investment screening process, in addition to the credit screening process.

It will be underpinned by a strategy balancing predominantly investment grade 'core' assets with a smaller 'plus' allocation to high yield and unrated securities. This "barbell strategy" seeks to preserve the defensive characteristics of fixed income, while offering the potential for strong cash-plus returns.

Mr Prabhu continued, "It's a positive development for our clients and any investors looking to align their investment portfolio with ethical and socially responsible investment considerations.

"With interest rates bottoming out in Australia, the timing of the Fund's launch means investors are poised to benefit from rising interest rates as the assets are not locked into a fixed interest rate."

The Fund is likely to appeal to those investors seeking:

- a portfolio of ethical and socially responsible floating rate bonds;
- regular income;
- low capital volatility; and
- liquidity.

The fund is available to retail investors now and can be accessed through the PDS [here](#). For additional information on the fund [click here](#).

- Ends -

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About Perpetual

Perpetual is a financial services group operating in funds management, financial advisory and trustee services. Our origin as a trustee company, coupled with our strong track record of investment performance, has created our reputation as one of the strongest brands in financial services in Australia. For further information, go to www.perpetual.com.au