

## Media Release

### **Perpetual Investments launches Trillium ESG Funds in Australia**

7 August 2020

Perpetual Investments is pleased to launch two environmental, social and governance (ESG) products to the Australian and New Zealand market – the Trillium ESG Global Equity Fund and the Trillium Global Sustainable Opportunities Fund.

The Trillium ESG Global Equity Fund is an actively managed, diversified portfolio of global equities that provides the potential for long-term capital growth by investing in companies that are leaders in managing ESG risks and opportunities. This fund has a comparable investment strategy to an existing US Trillium fund, of the same name, offered by Trillium Asset Management, LLC (Trillium) to United States residents for approximately 20 years.

The Trillium Global Sustainable Opportunities Fund is actively managed with a concentrated high-conviction, sustainability-themed strategy that invests in companies positioned to thrive during the ongoing transition to a more sustainable economy. This fund invests in companies contributing to three core sustainability themes through their core business:

- climate solutions
- economic empowerment
- healthy living.

“The interest in ESG globally has accelerated in recent times as a consequence of the COVID-19 pandemic, as well as locally with the extreme climate events recently experienced in Australia. There has also been strong interest in Trillium’s ESG offering from institutional investors, asset consultants and private clients in the months since we announced our acquisition of Trillium,” said Perpetual Global Head of Distribution Adam Quaife.

“We are proud to now offer Australian and New Zealand investors access to Trillium’s integrated ESG approach, which has the objective of providing investors with long-term capital growth through investment in global companies. This fits comfortably with Perpetual Investments’ focus on fundamental research and analysis of quality, value and risk.”

Trillium’s rigorous selection criteria is fossil fuel free and integrates financial and ESG research to seek high-quality growth companies at a reasonable price, resulting in equity portfolios that seek positive risk-adjusted long-term investment performance.

Perpetual Limited completed its acquisition of Trillium a specialist ESG investment firm based in Boston USA, on 30 June 2020. The Trillium ESG Global Equity Fund and the Trillium Global Sustainable Opportunities Fund are the first Trillium funds to be offered to Australian and New Zealand investors.

For further information, please visit: [www.perpetual.com.au/trillium](http://www.perpetual.com.au/trillium)

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### **About Perpetual Investments**

Perpetual Investments is one of Australia's most highly regarded and awarded investment managers, with an enduring passion for protecting and growing our clients' wealth. We offer a broad range of products for personal investment, superannuation and retirement to individuals, financial advisers and institutions across Australian and global shares, multi asset investments, credit and fixed income and Trillium ESG investment strategies.

### **About Trillium**

Trillium Asset Management, with over AUD\$5.7 billion in funds under management (as of 29 May 2020), offers investment strategies and services that advance humankind toward a global sustainable economy, a just society, and a better world. For nearly 40 years, the firm has been at the forefront of ESG thought leadership and draws from decades of experience focused exclusively on responsible investing. Trillium uses a holistic, fully integrated fundamental investment process to uncover compelling long-term investment opportunities. Devoted to aligning stakeholders' values and objectives, Trillium combines impactful investment solutions with active ownership. The firm delivers equity, fixed income, and alternative investments to institutions, intermediaries, high net worth individuals, and other charitable and non-profit organisations with the goal to provide positive impact, long-term value, and 'social dividends'. For further information, go to [www.trilliuminvest.com](http://www.trilliuminvest.com)

### **Important Information**

This information has been prepared by Perpetual Investment Management Limited (PIML) ABN 18 000 866 535, AFSL 234426, the responsible entity and issuer of the Trillium Global ESG Fund and the Trillium Global Sustainable Opportunities Fund (each a Fund and collectively the Funds). PIML has appointed Trillium Asset Management, LLC (Trillium) to act as the manager of the Funds. Trillium is an authorised representative (Representative number 001282762) of Perpetual Corporate Trust Limited ABN 99 000 341 533 AFSL 392673. No company in the Perpetual Group (Perpetual Limited ABN 86 000 431 827 and its subsidiaries) guarantees the performance of any fund or the return of an investor's capital. The document contains general information only and is not intended to provide you with financial advice or take into account your objectives, financial situation or needs. You should consider, with a financial adviser, whether the information is suitable for your circumstances. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information. Past performance is not indicative of future performance. The Product Disclosure Statements for each Fund, dated 4 August 2020 (PDS), issued by PIML, should be read and considered before deciding whether to acquire or hold units in the relevant fund. The PDSs are available and can be obtained by calling 1800 022 033 (within Australia) or +61(2) 9299 9621 (from overseas) or visiting [www.perpetual.com.au/trillium](http://www.perpetual.com.au/trillium)