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Media Release

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Perpetual Wealth Management's Responsible Investment portfolio now available on HUB24 platform

Perpetual Wealth Management's Direct Australian Equities Responsible Investment portfolio has recently been added to the HUB24 Managed Portfolio platform, giving financial advisers and their clients greater access to the portfolio purpose-built for managed accounts.

The Responsible Investment portfolio, managed by portfolio manager Daniel Nelson, has \$155 million in funds under management¹ and was certified by the Responsible Investment Association Australasia (RIAA) in June 2024.

Head of Partnerships, Investments Research Alan Logan said: "We know through our high net worth and not-for-profit business that responsible and ethical investment solutions are at the forefront of many adviser-client conversations. The addition of the Responsible Investment portfolio on the HUB24 platform gives more advisers and clients potential access to these types of investments."

As at 30 June 2024, the Perpetual Wealth Management Direct Equities team managed approximately \$4.43 billion in funds under advice. The Direct Equities team comprises six investment professionals with an average tenure of 15 years' experience.

Portfolio Manager Daniel Nelson said: "We have a tried and tested philosophy that focuses on quality and value, and we implement this approach with a constant lens on first protecting and then growing our clients' wealth.

"With an investment universe of approximately 300 stocks, our robust screening and stock analysis create a high conviction portfolio of 20 – 30 stocks, while paying close attention to portfolio parameters, risk measures and liquidity."

Teams within Perpetual Wealth Management are now also using *EthosESG*, a platform that evaluates more than 1.5 million impact metrics from both public and private companies, allowing comparability and analysis across portfolios, strategies and asset classes through a prism of 45 ESG causes such as climate, equality, education, mental health, justice and more. Earlier this year Perpetual entered into a partnership with ACA Group, a leading global financial advisory and technology firm headquartered in New York, to utilise the platform.

"The platform is a real game-changer for our business and lifts our client offering to a new level, providing another reference point for our teams to more closely scrutinise stocks within the investment universe," said Mr Logan

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¹ As at 31 July 2024