



Media Release

Perpetual's Ethical SRI fund celebrates 20-year milestone

2 June 2022

Perpetual's Ethical SRI fund (the fund) has recently celebrated 20 years since inception, with approximately \$900 million in funds under management¹ now invested in quality shares of Australian ethical and socially responsible companies.

The fund was the first in what is now a suite of ESG investment strategies that sit within Perpetual Asset Management Australia.

Commenting on the milestone, Portfolio Manager Nathan Hughes said: "Twenty years ago ethical investing was in some respects a 'boutique' investment philosophy in Australia.

"While investors were cognisant of environmental and governance matters associated with a particular company, social issues such as modern slavery and ethical sourcing are now also very much front-of-mind and is something that must be considered in any ethical investment."

Research conducted by Perpetual last year showed 25% of Australians try to invest in companies that are not harmful to the environment and society, and 24% of Australians are actively looking to invest in companies that are beneficial to the environment and society².

The Ethical SRI fund aims to provide long-term capital growth and regular income through investment in quality shares of ethical and socially responsible companies.

The fund will not invest in companies that derive a material proportion (5% or more) of their revenue from the manufacture or sale of generally ethically unacceptable products and services.

"We have a robust ethical screening process that, when combined with our bottom-up, value-based approach that is fundamental to all Perpetual investments, enables us to build a portfolio that marries the growing investor appetite for ESG investing while seeking returns that outperform the benchmark over the long term."

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About Perpetual Asset Management Australia

¹ FuM as at 31 March 2022

² Results taken from the 'What do you care about?' 2021 Survey, The Planet Edition - Sustainable Investing, conducted by Perpetual Limited.

Perpetual Asset Management Australia is a dynamic, active manager, offering an extensive range of specialist investment capabilities to individuals, financial advisers and institutions. This includes [Australian](#) and [global shares](#), [multi asset](#) investments, [credit and fixed income](#), [Trillium](#) ESG global shares and Barrow Hanley global shares investment strategies.

Important Information

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The product disclosure statement (PDS) for the Perpetual Ethical SRI Fund issued by PIML, should be considered before deciding whether to acquire or hold units in the fund. The PDS and Target Market Determination can be obtained by calling 1800 022 033 or visiting our website www.perpetual.com.au. To view the Perpetual Group's Financial Services Guide, please click [here](#).