

## Zenith names Perpetual 2023 fund manager of the year

**By Perpetual Asset Management** 

18 October 2023



RESPECTED fund-rating house Zenith Investment Partners has named Perpetual its 2023 "Fund Manager of The Year".

It's the second time in two months that Perpetual has won the top recognition at an awards night.

Last month Financial Newswire/SQM Research also named <u>Perpetual its 2023 Fund Manager</u> of the Year.

Besides the top award, Perpetual won several categories at the Zenith 2023 Awards including:

- Australian Equities Alternative Strategies
- Multi Asset Real Return

Asset manager Pendal, which is now part of Perpetual Group, was also recognised as winner of the <u>Sustainable and Responsible Investments (Income)</u> category.

The Zenith awards take into account factors such as organisational and investment team strength, investment philosophy, portfolio construction, risk management and fees.

"There's no short-termism determining any award — the winning fund managers have to demonstrate they have what it takes to deliver for investors over the long term," Zenith says.

Perpetual and Pendal were recognised as finalists in several other categories of the Zenith Awards, including:

- Alternative strategies (Perpetual)
- Australian real estate investment trust (Pendal)
- Global and diversified fixed interest (Perpetual)

Find out about Perpetual's <u>Financial Newswire/SQM Research 2023 Fund Manager of the Year</u> award.

Zenith Investment Partners Pty Ltd ABN 27 103 132 672 AFSL 226872 Fund Awards issued 13 October 2023 are solely statements of opinion and not a recommendation in relation to making any investment decisions.

Fund Awards are current for 12 months and subject to change at any time. Fund Awards for previous years are for historical purposes only. Full details on Zenith Fund Awards at www.zenithpartners.com.au/zenith-fund-awards-2023/

This information has been prepared by Perpetual Investment Management Limited (PIML) ABN 18 000 866 535, AFSL 234426. It is 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. The information is believed to be accurate at the time of compilation and is provided in good faith. This document may contain information contributed by third parties. PIML does not warrant the accuracy or completeness of any information contributed by a third party. Forward looking statements and forecasts based on information available at the time of writing and may change without notice. No assurance is given that the forecast will prove to be accurate, as future events may impact actual results and these could differ materially from those anticipated.

Any views expressed in this document are opinions of the author at the time of writing and do not constitute a recommendation to act.

The product disclosure statement (PDS) for the relevant funds, 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. 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. No allowance has been made for taxation and returns may differ due to different tax treatments. Past performance is not indicative of future performance.