

14 December 2022

ClearLife Capital selects Equity Trustees for AU/NZ long short fund

Australian investment firm ClearLife Capital Pty Ltd has selected Equity Trustees to be the trustee for its new wholesale fund, the ClearLife Capital Opportunities Fund.

Russell Beasley, Executive General Manager, Corporate Trustee Services, Equity Trustees said: "We are delighted to be appointed as trustee for ClearLife Capital's long short equities fund for wholesale investors and look forward to continuing to work closely with the team."

The ClearLife Opportunities Fund invests primarily in a portfolio of securities listed on the Australian and New Zealand stock exchanges – taking both long and short positions. The Fund aims to deliver risk-adjusted returns over the RBA Cash Rate (after fees and before tax) across a range of market environments over the medium to long term. The Fund may also invest in exchange traded or over the counter derivatives for risk management purposes.

ClearLife Capital was founded by David Moberley and James McBeath with investor alignment as a key tenet. The founders are significant investors in the fund, there are no competing products and capacity has been tightly managed. The pair have significant experience in financial markets and share a long history of previously working together at a market leading Australian equity manager.

David Moberley at ClearLife Capital said: "We're excited to be launching and growing the ClearLife Capital Opportunities Fund and welcome an experienced trustee like Equity Trustees by our side."

"We believe fundamentals ultimately drive stock returns and our research framework encapsulates both micro and macro-economic analysis. Our belief is that there are significant opportunities to exploit inefficiencies across individual stocks, sectors and the overall market. Our process capitalises on these whilst retaining capital preservation at the forefront of our ethos. We believe alternative investments that can deliver uncorrelated returns across a broad range of market environments are highly attractive," Mr McBeath said.

Mr Beasley added: "Our expertise and years of experience with over 350 diverse managed investment schemes means we are well placed to provide trustee services for long short investment approaches across a variety of share markets."

MEDIA INQUIRIES

Alicia Kokocinski

General Manager – Marketing & Communications

+61 03 8623 5396 / +61 403 172 024

akokocinski@eqt.com.au

Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth, London and Dublin.

Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers.