

19 September 2014

Equity Trustees to be included in S&P/ASX 300 Index

Listed financial services organisation Equity Trustees Limited will be included in the S&P/ASX 300 Index, effective after the close of trading on 19 September 2014, following the index composition review, said Equity Trustees Managing Director Robin Burns.

The move follows Equity Trustees acquisition of 100 per cent of ANZ Trustees Limited for \$150 million in July, which entrenches its position as a leading provider of private and corporate trustee, investment and administration services.

“Equity Trustees is Australia’s largest independent dedicated trustee services company Mr Burns said. “The index inclusion is a significant and important stage in our corporate development and a good marker of our progress, growth and potential.

“This is a positive step for the company. It means that any fund manager or institutional investor using the S&P/ASX 300 index as a benchmark will maintain an interest in Equity Trustees and its performance, and is a potential investor.”

Mr Burns said a future goal for the business is to be included into the more widely used and general benchmark of the S&P/ASX 200.

“Strong organic business growth over the coming periods is a key to achieving this next goal, and we are also interested in potential acquisitions that are complementary to our long term strategic direction.”

EQT’s total funds under management and administration now stand at approximately \$40 billion.

The S&P/ASX 300 Index is rebalanced every six months, with changes taking effect on the third Friday of March and September.

It covers approximately 81% of Australian equity market capitalisation. This index is designed to address investment managers’ needs to benchmark against a broad opportunity-set characterised by sufficient size and liquidity*.

**Source: S&P Dow Jones Indices*

Equity Trustees Limited (EQT) is a publicly listed company that provides a range of financial services to corporate and private clients. Its businesses include asset management, distribution, responsible entity appointments, private client wealth management, and corporate and personal superannuation.

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