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SQM Research rates four Equity Trustees funds ‘Superior’

Equity Trustees has welcomed ‘Superior’ (four star) ratings from SQM Research for four of its funds managed by its Asset Management team.

The ratings were awarded to the EQT Tax Aware Australian Equity Fund, EQT Ethical Tax Aware Australian Equity Fund, the EQT Flagship Fund and the Mortgage Income Fund. It is the first time the Australian Equity funds have been rated by SQM Research, while the Mortgage Income Fund was upgraded from 3.75 stars.

The Reports noted the strong performance of the funds as well as strong processes and high calibre management. It also noted that the investment process and Asset Management team were experienced, capable and collegiate, enabling robust debate within the team on investment ideas and decisions.

SQM’s High Investment Grade rating views the Funds suitable for inclusion on most Approved Product Lists (APL’s).

Darren Thompson, Head of Asset Management at Equity Trustees, said: “Our Australian Equity investment philosophy aims to identify quality companies at a reasonable price coupled with distinct focus on the after-tax returns offered to investors.

“This rating is affirmation of our experienced team’s ‘quality at a reasonable price’ framework and our after-tax returns to our investors – it’s a strategy that is performing consistently above benchmark,” he added.

More about the Equity Trustees Asset Management team and the funds can be found [here](#).

MEDIA INQUIRIES

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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, superannuation trusteeship and Responsible Entity (RE) services for external Fund Managers. 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, Dublin and London.

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