

27 November 2023

Eley Griffiths Group selects Equity Trustees as RE for new Mid Cap equities strategy

Eley Griffiths Group (EGG), an employee-owned, boutique equity investment manager, has chosen Equity Trustees to be the responsible entity of its new fund, the Eley Griffiths Group Mid Cap Fund.

Andrew Godfrey, Executive General Manager, Corporate and Superannuation Trustee Services said: "We are delighted to be selected as the responsible entity for this Mid Cap Fund by EGG and look forward to working alongside EGG and help guide their third fund."

The EGG Mid Cap Fund principally invests in Australian and New Zealand companies listed on the ASX or NSX that fall outside the S&P/ASX50 Index. Many of these companies were once successful small cap stocks that EGG has researched extensively over its 20-year history as a small and emerging companies' specialist.

EGG Portfolio Manager David Allingham said, "Companies that reside in this segment of the market tend to have a number of attractive attributes such as experienced management teams, well established and profitable business models, sound governance practices and deep market liquidity."

He said the hurdle to launch a new strategy at EGG is very high and there needs to be a clear opportunity for EGG to provide a differentiated return profile for asset allocators. "We are looking forward to deploying EGG's style-agnostic investment process in the mid cap segment of the market, with the aim of providing investors a portfolio that can navigate the full market and economic cycle."

"The EGG Mid Cap Fund is managed by an experienced investment team with diverse skill sets and a broad capability across the market. The team also has specialist expertise in analysing resources, which accounts for around 35% of the Fund's benchmark via the Materials and Energy sector," said Mr Allingham.

Equity Trustees' Mr Godfrey added: "Our diligence and experience in funds governance allows us to work with a wide range of asset management firms, across a diverse range of boutique investment philosophies."

MEDIA INQUIRIES

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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.