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Blackwattle Investment Partners selects Equity Trustees for inaugural range of Australian equity funds

Blackwattle Investment Partners, a boutique equity investment manager, has chosen Equity Trustees to be the responsible entity for its first range of Australian Equity funds the Blackwattle Small Cap Quality Fund, Blackwattle Large Cap Quality Fund, Blackwattle Mid Cap Quality Fund and Blackwattle Long-short 130/30 Quality Fund.

Russell Beasley, Executive General Manager, Corporate Trustee Services, Equity Trustees said: “We are delighted to be selected as the responsible entity role for this exciting new range of equity funds from Blackwattle. We look forward to working alongside Blackwattle into the future as they enter the market and continue to grow their offering.”

- The Blackwattle *Small Cap* Quality Fund provides investors with exposure to smaller Australian companies that are emerging as industry leaders. Its benchmark return is the S&P/ASX Small Ordinaries Accumulation Index.
- The Blackwattle *Mid Cap* Quality Fund provides investors with exposure to Australian businesses that have built a strong advantage within their industry, seeking to benchmark against the S&P/ASX300 – ASX20.
- The Blackwattle *Large Cap* Quality Fund provides investors with exposure to established Australian companies with a sustainable forward advantage. The fund’s aim is to outperform the S&P/ASX 200 Accumulation Index over the medium to long term.
- The Blackwattle *Long-Short 130/30* Quality Fund provides investors with both long exposures to established Australian companies with a sustainable forward advantage and short exposure to Australian companies with a weakening forward advantage. Its aim is to outperform the S&P/ASX 200 Accumulation Index over the medium to long term.

Michael Skinner the Managing Director and CIO at Blackwattle said, “We are extremely proud to launch our foundational range of equity funds to Australian investors, offering investment solutions that are backed by aligned management and investment teams, that will act with enhanced transparency”.

“We have refined our inaugural investment offerings to reflect our strong belief of investing in Australian business that have a forward advantage, aligned management, and are priced below their intrinsic value. Coupled with our aligned and transparent business model, we believe Blackwattle will provide a refreshing offering to Australian investors across domestic equity markets, and in future across global equity markets”, said Mr Skinner.

Launched in 2023, Blackwattle Investment Partners is a new generation, Australian investment manager, that centres its investment philosophy on a quality approach to investment management. With over 135 years of combined experience and A\$10 million in personal capital commitment, Blackwattle seeks to differentiate itself through investment excellence, transparency, and governance.

Equity Trustees’ Mr Beasley added: “Our expertise and decades of experience in funds governance establishes us well to work diligently with Blackwattle as they enter and expand in the domestic equity market”.

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, Sydney, Adelaide, 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.