

MEDIA RELEASE

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Eight Investment Partners Pty Limited (8IP) opens first Australian equities impact investing fund to retail investors

The 8IP Australian Equity Impact Fund invests in ASX-listed companies that have a positive social or environmental impact and 8IP seeks to measure that impact.

Key Points and Summary

- **Research based – Companies are selected for inclusion in the portfolio** based on fundamental research by the 8IP investment team. A detailed report on the measureable social and environmental impact of the investee companies is produced annually.
- **Examples of “Impact” track record** – Last financial year, companies in the Fund generated 8,242 GWh of renewable energy, managed energy efficient lighting covering 562,000 sq metres, recycled 227,000 tons of paper and provided 1,678 rental accommodation for seniors with a satisfaction rating of 81.8%.
- **Strong investment track record** - The Fund was previously only available to sophisticated investors where it generated a post-fee cumulative return of **+23.6%** compared to the cumulative return from the All Ordinaries Accumulation Index of **+13.2%** (the investment benchmark for the fund) over 13 months since inception on 31 January 2017.
- **“Go anywhere portfolio”** – As a smaller companies specialist, 8IP can look across the market to find exciting impact companies, rather than focusing on weighting stocks to a benchmark index.
- **Growing new investment area** - According to the “Impact Investing Australia Report”, more than two thirds of all investors surveyed expect impact investing to become a more significant part of the investment landscape in the coming years.

Further Background

An increasing number of investors are looking to align their investments with their values. The challenge in Australia is do this in listed equities given that the stockmarket has significant exposure to the big banks and resource companies. As a specialist small companies’ funds manager, 8IP have been conducting fundamental research on listed Australian companies for over 5 years.

Kerry Series, CIO of 8IP, commented “We increasingly felt that there were sufficient listed companies to create an impact investing fund and so we seeded the 8IP Australian Equity Impact Fund in January 2017. My belief is that impact investing can produce attractive returns for investors as many of the underlying problems addressed by these companies are long-term megatrends”.

Currently (@28 February 2018) the portfolio is invested in 29 companies listed on the ASX, across the 10 impact focus areas listed below. Each investment is cross-referenced to the UN Sustainable Development Goals and the portfolio has covers 9 of the 17 goals.

Positive Impact areas included in the Fund

Impact focus area	Fund Weight %	Impact focus area	Fund Weight %
Affordable Housing	2.6	Renewable Energy	7.9
Care and Support	10.2	Wellbeing: Health Care Services	13.1
Education	19.9	Wellbeing: Medical Devices	7.2
Energy Storage and Efficiency	4.1	Wellbeing: Pharmaceuticals	3.1
Healthy Living	10.3	Cash (up to 20%)	17.8
Land and Resource Management	3.7	TOTAL	100.0

Industries excluded from the Fund

The Fund will not invest in the following industries - alcohol, tobacco, logging of old growth forests, weapons, gambling, pornography, nuclear and fossil fuels.

This means that the Fund would not invest in a company that has a positive impact from its core business activities if it has any exposure to one of these industries.

Brian Thomas, General Manager – Business & Investments at 8IP concluded “This unique Fund gives investors an opportunity to invest in a truly impactful way that was not previously available to investors with \$10,000 to invest. Aside from the usual return and portfolio information, investors also receive a detailed impact assessment each year”

For further information please contact

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Website Link :- [8IP Australian Equity Impact Fund](#)

About Eight Investment Partners (8IP)

8IP is a specialist funds manager based in Sydney that is owned by its staff. Established in 2009, 8IP is focused on managing equity portfolios for retail and institutional investors, including a specific capability managing portfolios of Australian small company securities.

8IP are true stock pickers who use bottom-up, fundamental research to construct high-conviction, long-term portfolios.

The firm is majority owned and led by Kerry Series and Stephen Walsh.

Kerry has 31 years' investment experience and was the co-founder of Perennial Investment Partners. After this he was the Head of Asia Pacific Equities at AMP Capital where he was responsible for three investment teams managing approximately \$5 billion of assets. Kerry also spent time in Hong Kong where he was an Investment Director for HSBC Asset Management.

Stephen has 30 years' investment experience dating from 1987 at Lloyds Merchant Bank followed by corporate management consulting (LEK Consulting) and broking in Asia where he was ranked number one Consumer analyst in the region. Moving to Australia in 2000, Stephen joined Macquarie Bank's Equities Research division leading Australian Banks Research. He then joined broker and small cap specialist Wilson HTM as Head of Research and then Head of equities.

The boutique model approach and remuneration structure support an investment-led culture by aligning the interests of their investment team with those of their investors. Key members of the investment team have equity in the business and invest in their funds.

Why Impact Investing?

Directing capital to the world's problems is more effective when investee companies are actively engaged with these key issues. Your capital is invested in companies that generate a positive social and environmental impact along with financial returns. The industries in which these companies operate tend to have structural growth tailwinds which, when combined with active stock selection, provides the opportunity to generate superior investment returns.