



PLATYPUS SYSTEMATIC GROWTH FUND

A smart approach to investing in Australian equities

The Platypus Systematic Growth Fund is an Australian equities factor fund that is actively managed to deliver outperformance with a reduced risk and cost profile.

WHY THE PLATYPUS SYSTEMATIC GROWTH FUND?



Smart design

Specifically designed for the Australian equities market



Smart construction

Targets a better risk-adjusted outcome than the benchmark



Smart technology

Industrialised decision-making at a reduced cost



A smart investment

Impressive performance in a variety of markets

Factors and technology designed to optimise growth, while managing risk and costs

Factor-based investing takes a view that certain factors (on average) are more important in capturing returns than others. Academic evidence indicates that these factors have worked positively across a range of markets and asset classes over many years and cycles.

There are five leading factors that are most often leveraged in factor funds. The Platypus Systematic Growth Fund is a factor fund that uses:

Momentum as the engine. Academic and practitioner research has found that portfolios constructed using momentum perform consistently well in the Australian equities market.

Growth as the reality check. By considering the fundamentals of high momentum stocks, the Platypus Systematic Growth Fund is able to ascertain whether a stock's momentum is genuine or speculative.

The Platypus Systematic Growth Fund also uses **technology** to industrialise decision-making and significantly improve outcomes:

- Reducing the impacts of emotional bias to improve decision-making
- Improving the volume of analysis and the Fund's efficiency

The five leading stock market factors



Value

Stock price relative to fundamental value



Size

The size of a stock based on market capitalisation



Growth

High growth stocks outperform low growth stocks on average



Quality

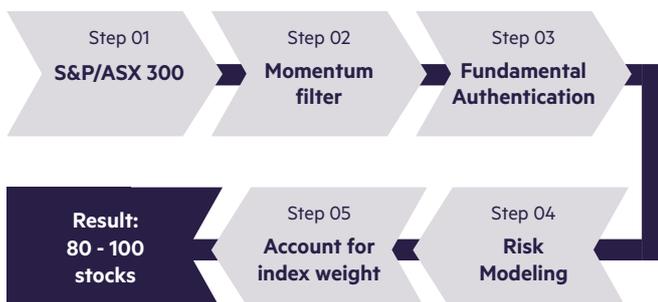
Based on business fundamentals, such as stable earnings, asset growth, return or debt to equity



Momentum

Stocks that have performed well in the past tend to do so moving forward

A transparent, disciplined and consistent process with impressive performance



Further to this, the Fund's process is designed to create better risk-adjusted returns than the market as a whole. It takes the investment universe (the S&P/ASX 300 Accumulation Index) and filters it down to 80 – 100 stocks. The end result is a Fund that:

- Consistently **outperforms the benchmark**
- Has a record of performance in both **up and down markets** and since inception it has performed in line with the index in up markets, while delivering an impressive 0.32% alpha in down markets
- Complements traditional **index, active or value strategies**

Fund objective

To outperform the S&P/ASX 300 Accumulation Index (before fees and expenses) over an investment cycle, with less downside risk over a rolling three-year period.

Fund Facts

| | |
|---|--|
| Inception | November 2009 |
| Cap bias | Small to mid cap |
| APIR | AUS0036AU |
| Management costs – Wholesale Units | <p>Management fee: 0.41% p.a. of the gross asset value of the Fund.</p> <p>Subject to recoverable expenses. Consult the PDS and AID for the financial year for more information.</p> |

Investment philosophy

Empirical evidence and academic research show that growth and momentum are persistent drivers of the Australian equity market performance. The Fund uses these factors to reweight the index thus exploiting the main drivers of Australian equities, whilst improving on the risks inherent in the published benchmark indices.

An experienced team



PETER BROOKE
Head of Quantitative Investments

The Platypus Systematic Growth Fund is led by Peter Brooke, the original designer of the portfolio.

The team has extensive experience across investments, technology and analytics.

About Platypus Asset Management

Platypus Asset Management is a specialist true to label Australian equities growth manager.

The company has been operating since 1997. In 2006, Platypus began operating under a 50% joint venture partnership with Australian Unity. “Our focus is to generate superior adjusted returns for investors. We believe that the risk-return offered by the Australian equity market can be improved by utilising skilfully applied active management.”

About Australian Unity

Australian Unity is a national healthcare, financial services and retirement living organisation providing services to around 1,000,000 Australians, including 300,000 members nationwide. Its wealth offering incorporates a comprehensive range of products including:

- Investment education and funeral bonds
- Cash and fixed interest funds
- Property funds
- Mortgage funds
- Diversified funds
- Australian and international shares

For additional information on Platypus Asset Management’s Australian Equities Fund

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Important Information

Units in the Platypus Australian Equities Fund (ARSN 119 236 403) are issued by Australian Unity Funds Management Limited ABN 60 071 497 115, AFS Licence No. 234454, as Responsible Entity. AUFM is part of the Australian Unity Group of companies which undertakes investment activities.

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Strengthened by

