



**SQM**  
RESEARCH

# Funds Research and Data

February 2022



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# SQM at a Glance

## Key Facts



Established in 2006



Privately owned – not affiliated with any large institution



Over 70 advice groups and platforms formally recognise SQM Ratings



All major administration platforms recognise SQM Ratings



Strong relationships with boutique investment consultants



Over 1,100 ratings issued since 2007 - over 260 Managers

## Partnerships



Money Management - Fund  
Manager of the Year Awards 2021



IMAP Managed Account Awards

# Low Conflicts of Interest – A Key Strength

## **SQM Research has minimal conflicts of interest**

It does not offer services which indirectly or directly compete with its clients, whether they are advisors, fund managers or consultants.

## **SQM Research is Australian and privately owned**

It has no conflicts arising from ownership links to large financial services providers such as banks, insurance companies, platforms or dealer groups

- it does not run a consulting business
- it does not trade, make markets, or invest in securities
- It does not have a funds management business

# SQM Research – Team Structure

**Managing Director**  
**Louis Christopher**  
(25/15)

| Research   |   | Business Management   | Administration  | IT / DATA  |
|--|---|---|---|--|
| Head of Research<br><b>Rob da Silva</b><br>(35/6)            |   | Head of Dealer Group Subscriptions<br><b>Matt Hattersley</b><br>(30/1)        | CFO/Compliance<br><b>Raymond Christian</b><br>(PT) (39/10)    | Senior IT<br><b>Max Breedon</b><br>(PT) (22/14)  |
| Senior Investment Analyst<br><b>Brendan Irwin</b><br>(42/2)  | Senior Investment Analyst<br><b>Patrick Bennett</b><br>(contractor) (25/3)    | Account Manager - Ratings<br><b>Peter Evans</b><br>(30/1)                     | Administrator<br><b>Kim Asbjerg</b><br>(4/1)                  | Databases & AVMs<br><b>Anthony Lee</b><br>(15/2) |
| Senior Investment Analyst<br><b>Chetan Trehan</b><br>(15/2)  | Senior Investment Analyst<br><b>Otto Rieth</b><br>(contractor) (18/2)         | General Manager – Property Data & Analytics<br><b>Anthony Ishac</b><br>(16/2) | Desktop Publishing Support<br><b>Roxanne Daniel</b><br>(10/1) | TBC  |
| Investment Analyst<br><b>Smita Bhakat</b><br>(5/2)           | Senior Investment Analyst<br><b>James Purvis</b><br>(contractor) (35/1)       |   |   |  |
| Junior Investment Analyst<br><b>Sam Worthington</b><br>(1/1) | Senior Investment Analyst<br><b>Richard Everingham</b><br>(contractor) (30/1) |   |   |  |

**(bracketed numbers are: Years of experience / Years at SQM)**

Note: Contractors are not direct employees of SQM Research. They may have other business interests separate to their SQM relationship. They are required to adhere to SQM's Conflict of Interest Policy and to comply with ASIC Regulation RG79.



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# Fund Rating Service

# SQM Research Rating Mission



SQM's mission is to **identify quality managers and investment opportunities** through its rating process.

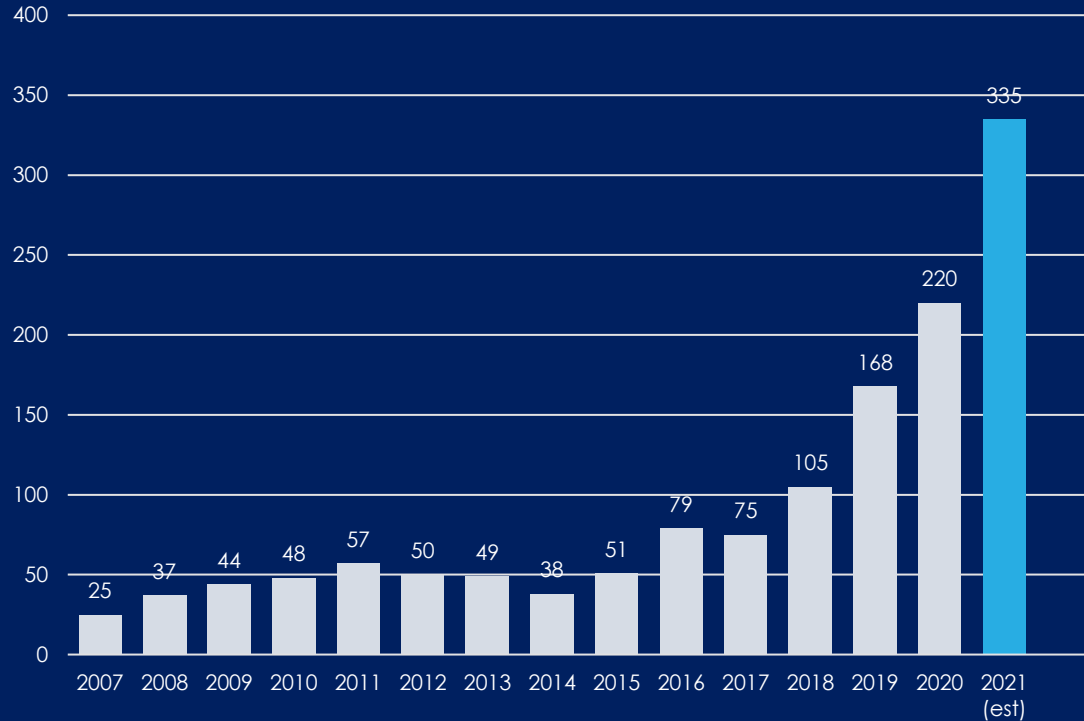
SQM offers a **full rating service** across **all** asset classes.

Utilising a rigorous and objective approach, SQM allocates star ratings that represent **informative opinions on fund manager competencies**.

SQM high star rated funds have the strong foundations necessary to **provide superior outcomes** to adviser clients.

# Growth in Fund Coverage

Ratings Produced (by calendar year)

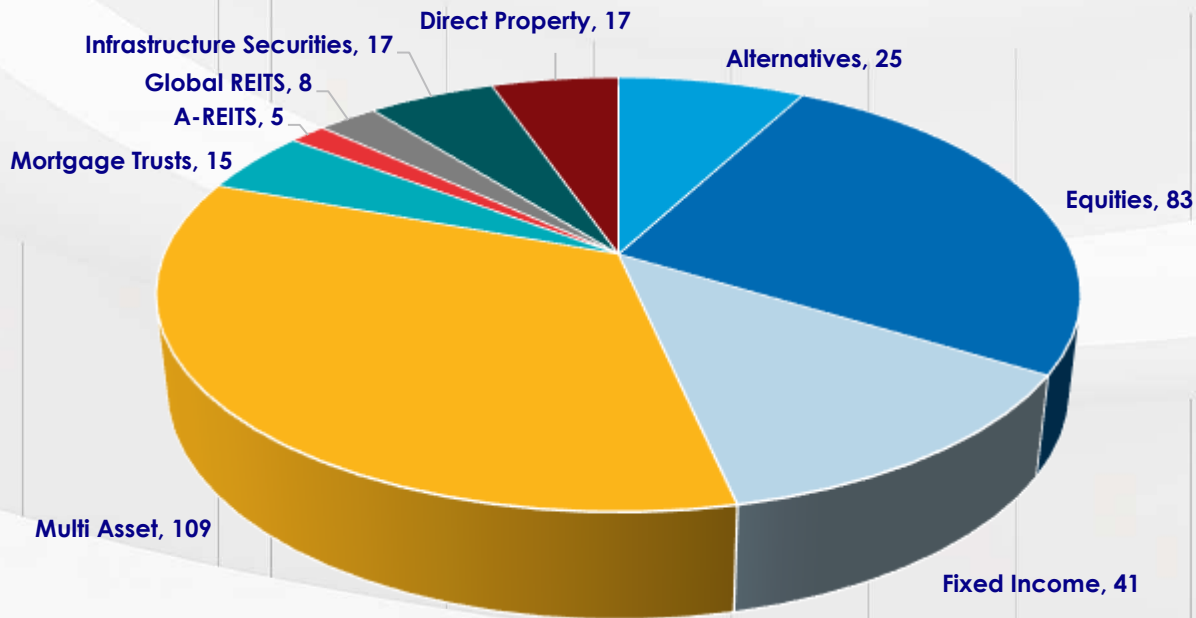


# Current Coverage

September 2021

## Ratings Count by Sector

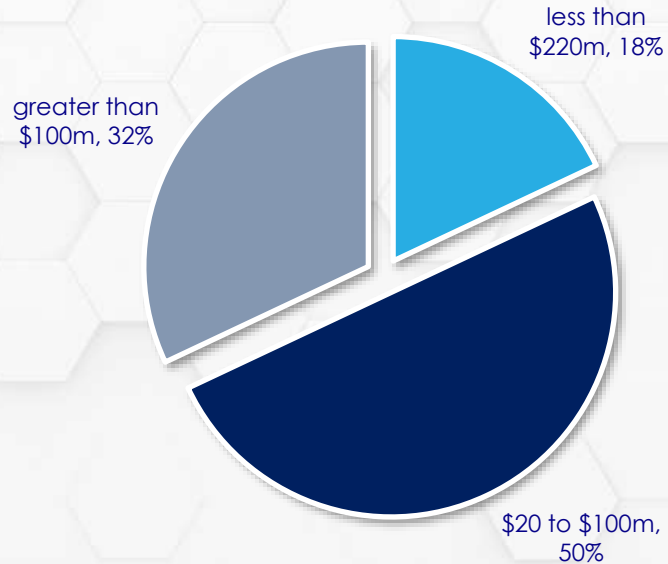
Number of Ratings including work-in-progress = 320



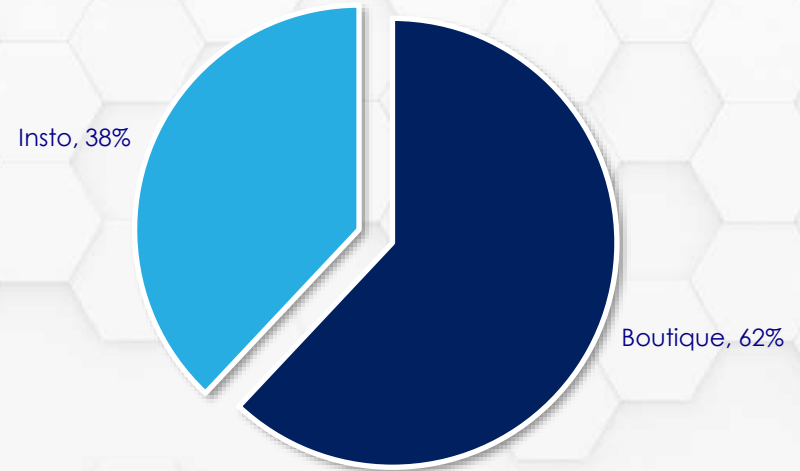


# Fund Rating Composition

## Ratings by Fund Size (% of total)



## Ratings by Mortgage Type (% of total)



# Overview of Services



## Rating Reports & Sector Reviews

Alternatives  
Global & Domestic Fixed Income  
Global & Domestic Equities  
A-REITs and G-REITs  
Infrastructure  
Residential Property  
Commercial Property  
Mortgage Trusts  
RMBS Funds  
ETFs and SMAs  
Multi-Asset



## Fund Explorer

- Over 10,000 funds & ETFs
- Extensive analytics
- Easy and intuitive to use
- Flexible charting tool
- One-click 6-page chartpack
- Customised chart packs
- Compare multiple funds
- One-page fund profile
- Fund Blending Tool
- Track groups of funds

## Equity Data

- Over 2,000 equities
- Share Profile & Key Statistics
- Summary of Financial Ratios
- Basic historical charts



## Residential Property Intelligence

- Comprehensive property transaction data
- Accurate, reliable automated valuations & indexes
- Annual Housing Boom & Bust Market Conditions report
- Distressed Listings
- Postcode Snapshots
- Bespoke data and research
- Residential & Commercial property insights
- Suburb risk assessment ratings
- Media commentary and publications

# Access to all of the Qualitative research reports...

## RATING REPORTS

Click on column headings to change the sorting column. Click on column heading again to change sort direction.

★ Fund Explorer

| Company            | Fund Name   | Fund Manager                                     | APIR      | Rating | Product Type                 | Issue Date | Report                     |
|--------------------|---|--|-----------|--------|------------------------------|------------|----------------------------|
| Australian Unity   | Australian Unity Healthcare Property Trust (Wholesale)          | Australian Unity Funds Management Limited        | AU50112AU | 4.75   | Direct Property              | 2021-12-07 | <a href="#">click here</a> |
| Australian Unity   | Australian Unity Healthcare Property Trust (Retail)             | Australian Unity Funds Management Limited        | AU50102AU | 4.75   | Direct Property              | 2021-12-07 | <a href="#">click here</a> |
| Australian Unity   | Australian Unity Healthcare Property Trust (Class A Units)      | Australian Unity Funds Management Limited        | AU50037AU | 4.75   | Direct Property              | 2021-12-07 | <a href="#">click here</a> |
| Maple-Brown        | Maple-Brown Abbott Global Listed Infrastructure (Hedged) Fund   | Maple-Brown Abbott Limited                       | MPL0008AU | 4.50   | Infrastructure Securities    | 2021-07-22 | <a href="#">click here</a> |
| Franklin Templeton | Franklin Australian Absolute Return Bond Fund                   | Franklin Templeton Investments Australia Limited | FRT0027AU | 4.50   | Fixed Income                 | 2021-09-16 | <a href="#">click here</a> |
| Macquarie          | Macquarie Hedged Index International Equities Fund              | Macquarie Investment Management Global Limited   | MAQ0421AU | 4.50   | Equities                     | 2022-02-10 | <a href="#">click here</a> |
| Charter Hall Maxim | Charter Hall Maxim Property Securities Fund                     | Charter Hall Property Securities Management Ltd  | COL0001AU | 4.50   | Domestic Property Securities | 2021-07-20 | <a href="#">click here</a> |
| Capital            | Capital Group New Perspective Fund - Unhedged                   | Capital International Inc                        | CIM0006AU | 4.50   | Equities                     | 2021-05-07 | <a href="#">click here</a> |
| Allan Gray         | Allan Gray Australia Stable Fund                                | Allan Gray Australia Pty Ltd                     | ETL0273AU | 4.50   | Multi Asset                  | 2021-06-11 | <a href="#">click here</a> |
| Allan Gray         | Allan Gray Australia Equity Fund Class A                        | Allan Gray Australia Pty Ltd                     | ETL0060AU | 4.50   | Equities                     | 2021-06-29 | <a href="#">click here</a> |
| Premium Asia       | Premium Asia Income Fund  | Premium China Funds Management/Value Partners HK | MAQ0782AU | 4.50   | Fixed Income                 | 2021-09-06 | <a href="#">click here</a> |
| Maple-Brown        | Maple-Brown Abbott Global Listed Infrastructure (UnHedged) Fund | Maple-Brown Abbott Limited                       | MPL0006AU | 4.50   | Infrastructure Securities    | 2021-07-22 | <a href="#">click here</a> |
| Quay               | Quay Global Real Estate Fund                                    | Quay Global Investors Pty Ltd                    | BFL0020AU | 4.50   | Global Property Securities   | 2022-03-01 | <a href="#">click here</a> |
| MLC                | MLC Premium Moderate 50 Model                                   | MLC Asset Management                             | NUN6749AU | 4.50   | Multi Asset                  | 2021-08-29 | <a href="#">click here</a> |
| MLC                | MLC Value Moderate 50 Model                                     | MLC Asset Management                             | NUN7096AU | 4.50   | Multi Asset                  | 2021-08-29 | <a href="#">click here</a> |
| MLC                | MLC Premium Balanced 70 Model                                   | MLC Asset Management                             | NUN4773AU | 4.50   | Multi Asset                  | 2021-08-29 | <a href="#">click here</a> |
| MLC                | MLC Premium Growth 85 Model                                     | MLC Asset Management                             | NUN0962AU | 4.50   | Multi Asset                  | 2021-08-29 | <a href="#">click here</a> |
| MLC                | MLC Value Balanced 70 Model                                     | MLC Asset Management                             | NUN4731AU | 4.50   | Multi Asset                  | 2021-08-29 | <a href="#">click here</a> |
| MLC                | MLC Value Growth 85 Model                                       | MLC Asset Management                             | NUN5432AU | 4.50   | Multi Asset                  | 2021-08-29 | <a href="#">click here</a> |
| P/E Global         | P/E Global FX Alpha Fund  | P/E Global LLC                                   | MAQ5143AU | 4.50   | Alternatives                 | 2021-09-16 | <a href="#">click here</a> |
| Capital            | Capital Group New Perspective Hedged AU                         | Capital International Inc                        | CIM0008AU | 4.50   | Equities                     | 2021-05-07 | <a href="#">click here</a> |
| Macquarie          | Macquarie True Index Australian Shares Fund                     | Macquarie Investment Management Global Ltd       | MAQ0288AU | 4.50   | Equities                     | 2022-02-10 | <a href="#">click here</a> |
| Macquarie          | Macquarie True Index International Equities Fund                | Macquarie Investment Management Global Limited   | MAQ0633AU | 4.50   | Equities                     | 2022-02-10 | <a href="#">click here</a> |
| Macquarie          | Macquarie True Index Global Real Estate Securities Fund         | Macquarie Investment Management Global Limited   | MAQ0832AU | 4.50   | Global Property Securities   | 2022-02-10 | <a href="#">click here</a> |

# Able to search funds by a range of characteristics...

The screenshot displays the SQM Fund Explorer interface. At the top left is the SQM Research logo. The main navigation bar includes 'Property', 'Shares', 'Funds' (which is active), 'Logout', and 'Account'. Below this is a 'FUND EXPLORER' header with a 'Rating Reports' button. A search bar is prominently featured with a magnifying glass icon. Below the search bar are several filter tabs: 'Quantitative Analysis', 'Blending & Customising', 'Compare', 'Performance Survey', 'User Funds', and 'Downloads'. The main filter area contains dropdown menus for 'Code/Name', 'Rating', 'Asset Class', 'Fund Sector', 'Equities Sector', and 'Investment Struct'. A search input field is labeled 'Multiple fund search (comma separated)'. Below this are 'Export All to Excel' and 'Export to Excel' buttons. Further down are 'Group', 'Sort', and 'Order' dropdowns, a 'Search' button, and checkboxes for 'Add to selection' and 'Exclude whitelabels'. A 'Manage Groups' button and a 'Clear Selection' button are also present. The main content area shows a table with columns for 'PRODUCT SEARCH', 'PERFORMANCE & PRICES', 'FEES & MINIMUMS', and 'ASSET ALLOCATION'. The table lists various funds with columns for APINID, Product Name, Asset Class, Sector, Rating, Type, and Reports. The table is sorted by Rating in descending order. The bottom right of the table area indicates 'Showing 1 to 500 of 500 entries'.

| PRODUCT SEARCH           | PERFORMANCE & PRICES | FEES & MINIMUMS                         | ASSET ALLOCATION |  |      |      |  |
|--------------------------|----------------------|---|------------------|--|------|------|--|
| <input type="checkbox"/> | AU5012AU             | Aus Unity Healthcare Property Wholesale | Property         | Unlisted and Direct Property                   | 4.75 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | AU50102AU            | AUI Healthcare Property Trust R         | Property         | Unlisted and Direct Property                   | 4.75 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | AU50037AU            | AUI Healthcare Property Trust A         | Property         | Unlisted and Direct Property                   | 4.75 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | MAQ0837AU            | True Index Global Infrastructure Secs   | Property         | Equity Global Infrastructure - Currency Hedged | 4.50 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | MAQ0832AU            | Macquarie True Index Gbl Rel Est Secs   | Property         | Equity Global Real Estate                      | 4.50 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | MAQ0830AU            | Hedged Index Global Real Estate Secs    | Property         | Equity Global Real Estate                      | 4.50 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | MAQ0829AU            | Hedged Index Global Infrastructure Secs | Property         | Equity Global Infrastructure - Currency Hedged | 4.50 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |
| <input type="checkbox"/> | MAQ0789AU            | Macquarie True Index Cash Fund          | Cash             | Australian Cash                                | 4.50 | Fund | <a href="#">Reports</a> <a href="#">print selected</a> |

# One click access to key reports and chart packs...

The screenshot displays the SQM Research Fund Explorer interface. At the top, there is a navigation bar with the SQM Research logo, a search bar, and several menu items: Property, Shares, Funds (highlighted), Logout, and Account. Below this is a secondary navigation bar with icons for Quantitative Analysis, Blending & Customising, Compare, Performance Survey, User Funds, and Downloads. A red 'Rating Reports' button is also visible.

The main interface features a filter section with dropdown menus for Code Name, Rating, Asset Class, Fund Sector, Equities Sector, and Investment Struct. Below the filters are search and export options, including 'Export All to Excel' and 'Export to Excel'. A table of funds is displayed below, with columns for Product Search, Performance & Prices, Fees & Minimals, and Asset Allocation. The table shows a list of funds with columns for APID, Product Name, Asset Class, Sector, Rating, Type, and Reports. The Reports column contains icons for various reports, which are circled in red in the image.

| APID      | Product Name                            | Asset Class | Sector   | Rating | Type | Reports        |
|-----------|---|-------------|--|--------|------|----------------|
| AUS012AU  | Aus Unity Healthcare Property Wholesale | Property    | Unlisted and Direct Property                   | 4.75   | Fund | [Report Icons] |
| AUS0102AU | AUI Healthcare Property Trust B         | Property    | Unlisted and Direct Property                   | 4.75   | Fund | [Report Icons] |
| AUS0037AU | AUI Healthcare Property Trust A         | Property    | Unlisted and Direct Property                   | 4.75   | Fund | [Report Icons] |
| MAQ0831AU | True Index Global Infrastructure Secs   | Property    | Equity Global Infrastructure - Currency Hedged | 4.50   | Fund | [Report Icons] |
| MAQ0832AU | Macquarie True Index Gbl Rel Est Secs   | Property    | Equity Global Real Estate                      | 4.50   | Fund | [Report Icons] |
| MAQ0830AU | Hedged Index Global Real Estate Secs    | Property    | Equity Global Real Estate                      | 4.50   | Fund | [Report Icons] |
| MAQ0829AU | Hedged Index Global Infrastructure Secs | Property    | Equity Global Infrastructure - Currency Hedged | 4.50   | Fund | [Report Icons] |
| MAQ0789AU | Macquarie True Index Cash Fund          | Cash        | Australian Cash                                | 4.50   | Fund | [Report Icons] |

# Create groups of funds for quick access...

The screenshot displays the SQM FUND EXPLORER interface. At the top, there is a navigation bar with the SQM Research logo, a search bar, and several menu items: Property, Shares, Funds (selected), Logout, and Account. Below this is a secondary navigation bar with icons for Quantitative Analysis, Blending & Customising, Compare, Performance Survey, User Funds, and Downloads. A red 'Rating Reports' button is also visible.

The main search area includes filters for Code/Name, Rating, Asset Class, Fund Sector, Equities Sector, and Investment Struct. Below these are search input fields and buttons for 'Export All to Excel' and 'Export to Excel'. A 'Groups' dropdown menu is open, showing options: 'Asset Funds', 'Aren Funds', 'Aust Long Short', 'Bespoke Peer Group', and 'Emerging Markets Funds'. The 'Groups' dropdown is circled in red.

The search results table is displayed below, with columns for Product Name, Asset Class, Sector, Rating, Type, and Reports. The table shows 5 results, including Charter Hall Maxim Property Securities, APN AREIT, Zurich Investments Aus Property Secs, S&P/ASX 300 A-REIT TR, and Vanguard Property Sec Index.

| Product Name                           | Asset Class | Sector                       | Rating | Type | Reports |
|--|-------------|------------------------------|--------|------|---------|
| Charter Hall Maxim Property Securities | Property    | Equity Australia Real Estate | 4.50   | Fund | [Icons] |
| APN2008AU                              | Property    | Equity Australia Real Estate | 4.25   | Fund | [Icons] |
| ZUR0064AU                              | Property    | Equity Australia Real Estate |        | Fund | [Icons] |
| XIUSA04CAT                             |             |                              |        | Fund | [Icons] |
| F0000MK00                              | Property    | Equity Australia Real Estate |        | Fund | [Icons] |

# Able to generate many individual quantitative reports...

The screenshot displays the SQM Research Fund Explorer interface. At the top, there is a navigation bar with the SQM Research logo, a search bar, and several menu items: Property, Shares, Funds (selected), Logout, and Account. Below this is a secondary navigation bar with icons for Search, Quantitative Analysis (selected), Blending & Customising, Compare, Performance Survey, Use Funds, and Downloads. A red button labeled "Rating Reports" is also visible.

The main content area features a filter section with "History From" and "History To" date pickers (both set to dd/mm/yyyy), a "Period" dropdown menu (set to "Year"), and a "Benchmark" dropdown menu (set to "None selected"). An "Export to Excel" button is located to the right of the benchmark dropdown.

Below the filter section is a grid of 12 icons representing various quantitative metrics: Asset Allocation, Excess Returns, Semi-Annual Excess Returns, Cumulative Excess Returns, Returns, Growth of \$10,000, Information Ratio, Tracking Error, Correlation w/ Benchmark, Fund Drawdowns, P/Share / Return, and MTD Performance. A second row of icons includes: P/E Ratio of Excess Returns, Divisor of Total Returns, Sharpe Ratio, Sharpe Ratio, Volatility, Beta, Funds under Management, Daily Prices, Indexed Daily Prices, TPI, Indexed TPI, and Style & Size.

At the bottom, there is a "PRODUCT SEARCH" tab selected, with other tabs for "PERFORMANCE & PRICES", "FEES & MINIMUMS", and "ASSET ALLOCATION". The text "Showing 1 to 500 of 500 entries" is displayed on the right. Below the tabs is a table with the following columns: APRI/O, Product Name, Asset Class, Sector, Rating, Type, and Reports (with a sub-column for "print selected").

| APRI/O                   | Product Name | Asset Class                             | Sector   | Rating | Type | Reports (print selected) |
|--------------------------|--------------|---|----------|--------|------|--------------------------|
| <input type="checkbox"/> | AUS012AU     | Aus Unity Healthcare Property Wholesale | Property | 4.75   | Fund |                          |
| <input type="checkbox"/> | AUS0102AU    | AUI Healthcare Property Trust R         | Property | 4.75   | Fund |                          |
| <input type="checkbox"/> | AUS0037AU    | AUI Healthcare Property Trust A         | Property | 4.75   | Fund |                          |
| <input type="checkbox"/> | MAQ0831AU    | True Index Global Infrastructure Secs   | Property | 4.50   | Fund |                          |
| <input type="checkbox"/> | MAQ0832AU    | Macquarie True Index Gbl Ref Est Secs   | Property | 4.50   | Fund |                          |
| <input type="checkbox"/> | MAQ0830AU    | Hedged Index Global Real Estate Secs    | Property | 4.50   | Fund |                          |
| <input type="checkbox"/> | MAQ0829AU    | Hedged Index Global Infrastructure Secs | Property | 4.50   | Fund |                          |
| <input type="checkbox"/> | MAQ0789AU    | Macquarie True Index Cash Fund          | Cash     | 4.50   | Fund |                          |

# Create portfolios and customise chart packs...

The screenshot displays the SQM Research Fund Explorer interface. At the top left is the SQM Research logo. The main header includes 'FUND EXPLORER' and a 'Rating Reports' button. Navigation tabs include 'Property', 'Shares', 'Funds', 'Logout', and 'Account'. A secondary navigation bar contains 'Search', 'Quantitative Analysis', 'Blending & Customising', 'Compare', 'Performance Survey', 'User Funds', and 'Downloads'. Below this is a form for selecting peers and benchmarks, with fields for 'Peer Group', 'Select Peers', 'Select Default Benchmark', 'History From', and 'History To'. A 'Generate Chart Pack' button is also visible. The main content area shows a table of funds with the following columns: API ID, Product Name, Asset Class, Sector, Rating, Type, and Reports. The table lists nine funds, including Aus Unity Healthcare Property Wholesale, AUI Healthcare Property Trust B, AUI Healthcare Property Trust A, True Index Global Infrastructure Sect, Macquarie True Index Glob Real Est Sects, Hedged Index Global Real Estate Sects, Hedged Index Global Infrastructure Sects, Macquarie True Index Cash Fund, and Macquarie Index Tracking Global Bond.

| API ID    | Product Name                             | Asset Class  | Sector   | Rating | Type | Reports (2) print selected |
|-----------|--|--------------|--|--------|------|----------------------------|
| AUS002AU  | Aus Unity Healthcare Property Wholesale  | Property     | Unlisted and Direct Property                   | 4.75   | Fund | [Icons]                    |
| AUS002AU  | AUI Healthcare Property Trust B          | Property     | Unlisted and Direct Property                   | 4.75   | Fund | [Icons]                    |
| AUS003AU  | AUI Healthcare Property Trust A          | Property     | Unlisted and Direct Property                   | 4.75   | Fund | [Icons]                    |
| MAQ081AU  | True Index Global Infrastructure Sect    | Property     | Equity Global Infrastructure - Currency Hedged | 4.50   | Fund | [Icons]                    |
| MAQ082AU  | Macquarie True Index Glob Real Est Sects | Property     | Equity Global Real Estate                      | 4.50   | Fund | [Icons]                    |
| MAQ083AU  | Hedged Index Global Real Estate Sects    | Property     | Equity Global Real Estate                      | 4.50   | Fund | [Icons]                    |
| MAQ0829AU | Hedged Index Global Infrastructure Sects | Property     | Equity Global Infrastructure - Currency Hedged | 4.50   | Fund | [Icons]                    |
| MAQ0799AU | Macquarie True Index Cash Fund           | Cash         | Australian Cash                                | 4.50   | Fund | [Icons]                    |
| MAQ0266AU | Macquarie Index Tracking Global Bond     | Fixed Income | Bonds - Global                                 | 4.50   | Fund | [Icons]                    |



# Generate fund vs. fund comparisons...

The screenshot displays the SQM Research Fund Explorer interface. At the top left is the SQM Research logo. The main header includes navigation links for Property, Shares, Funds (selected), Logout, and Account. Below this is a secondary navigation bar with icons for Search, Quantitative Analysis, Blending & Customising, Compare (highlighted), Performance Survey, User Funds, and Downloads. A red 'Rating Reports' button is also visible.

The central comparison tool includes a search bar, a 'Period' dropdown set to '5 years', a 'History To' field with 'dd/mm/yyyy', a 'Select benchmark' dropdown set to 'Use default', and a red 'Compare funds' button.

Below the comparison tool is a table with tabs for 'PRODUCT SEARCH', 'PERFORMANCE & PRICES', 'FEES & MINIMUMS', and 'ASSET ALLOCATION'. The table shows a list of funds with columns for APFRID, Product Name, Asset Class, Sector, Rating, Type, and Reports. The table is currently displaying 11 funds.

| APFRID    | Product Name                           | Asset Class            | Sector                    | Rating | Type | Reports |
|-----------|--|------------------------|---------------------------|--------|------|---------|
| FRT009AU  | Franklin Global Growth W               | International Equities | Equity World Large Growth | 4.25   | Fund | [Icons] |
| MMC010AU  | Loftus Peak Global Disruption          | International Equities | Equity World Large Growth | 4.25   | Fund | [Icons] |
| IML031AU  | Loomis Sayles Global Equity            | International Equities | Equity World Large Growth | 4.00   | Fund | [Icons] |
| OMF0040AU | Hoton Photon Fund                      | International Equities | Equity World Large Blend  | 3.75   | Fund | [Icons] |
| WHT0044AU | Capital Group Global Equity (AU)       | International Equities | Equity World Large Blend  |        | Fund | [Icons] |
| PLA0017AU | Platinum Global Fund                   | International Equities | Equity World Large Blend  |        | Fund | [Icons] |
| MAQ0430AU | Water Scott Global Equity              | International Equities | Equity World Large Growth |        | Fund | [Icons] |
| ETL0071AU | T. Rowe Price Global Equity I          | International Equities | Equity World Large Growth |        | Fund | [Icons] |
| ETL0172AU | MFS Concentrated Global Equity Trust W | International Equities | Equity World Large Blend  |        | Fund | [Icons] |
| IOF0080AU | Antipodes Global Fund - Long T         | International Equities | Equity World Large Value  |        | Fund | [Icons] |
| MCE0001AU | Hagafen Global Open Class              | International Equities | Equity World Large Blend  |        | Fund | [Icons] |
| ETL0496AU | DAN-Tribal Global Equity Fund          | International Equities | Equity World Large Growth |        | Fund | [Icons] |

# 2022 enhancements in the pipeline...

1 Top 200 direct shares research

2 Historical portfolio performance metrics



Want to know more?

Would like a one on one demonstration?

Give Matt a call on 0414 847 511 or email at [matthew@sqmresearch.com.au](mailto:matthew@sqmresearch.com.au)

Be in touch and let us know

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