



PLATYPUS SYSTEMATIC GROWTH FUND

Enhancing your Australian equities portfolio

Platypus Systematic Growth Fund is an innovative, cost-effective Fund that could add growth and stability to your Australian shares portfolio. It's a solid performer in up markets and saves its best work for the tough times.



WHY CHOOSE THE PLATYPUS SYSTEMATIC GROWTH FUND?



Diversify your Australian equities holding

- A diversified fund with 80 – 100 stocks.
- Reduces the risk associated with concentrated portfolios.



Benefit from an innovative approach to Australian equities

- Uses stock momentum and a transparent, disciplined and consistent process to create better risk-adjusted returns than the market.
- Uses technology to improve decision making and reduce costs compared to other active, diversified funds.

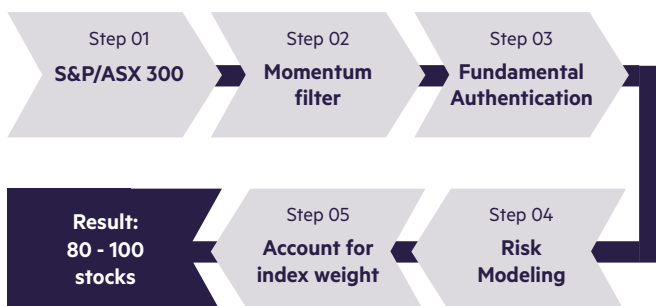


Optimise growth with reduced downside risk

- Performs in line with the benchmark in up markets. Substantially outperforms the benchmark in down markets.
- Complements traditional index, active or value strategies by adding growth with downside performance at an efficient cost.

How Platypus Systematic Growth Fund works

Platypus Systematic Growth Fund employs a process designed to create better risk-adjusted returns than the market as a whole. This process filters the investment universe (the S&P/ASX 300 Accumulation Index) down to a target of 80 – 100 stocks.



The Fund also uses advanced technology to improve analytical capabilities, efficiency and the quality of decision-making.

The end result is a Fund that:

- Offers **active management and high performance at a reduced cost**.
- Consistently **outperforms the benchmark index** (the S&P/ASX 300 Accumulation Index).
- Has a record of performance in **both up and down markets**. Since inception, it has performed in line with the benchmark index in up markets and better than the benchmark index 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.

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.

Research rating



Fund Facts

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

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 million 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 more information on the Platypus Australian Equities Fund, please contact your financial adviser.

Investor Services 13 29 39

Website australianunity.com.au/wealth

Important Information

Wholesale Units and Retail Units in the Platypus Systematic Growth Fund (Fund) are issued by Australian Unity Funds Management Limited ABN 60 071 497 115, AFSL No. 234454. The appointed investment manager is Platypus Asset Management Pty Ltd ABN 33 118 016 087, AFSL No. 301294.

Information provided here is general information only and current at the time of publication and does not take into account your objectives, financial situation or needs. In deciding whether to acquire, hold or dispose of the product you should obtain a copy of the Product Disclosure Statement (PDS) and seek professional financial and taxation advice. The PDS is available at australianunity.com.au/wealth or by calling our Investor Services team on 13 29 39. Past performance is not a reliable indicator of future performance. This information is intended for recipients in Australia only. Not to be reproduced without permission.

The Lonsec Rating (assigned September 2017) presented in this document is published by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445. The Rating is limited to “General Advice” (as defined in the Corporations Act 2001 (Cth)) and based solely on consideration of the investment merits of the financial product(s). Past performance information is for illustrative purposes only and is not indicative of future performance. It is not a recommendation to purchase, sell or hold Platypus Asset Management product(s), and you should seek independent financial advice before investing in this product(s). The Rating is subject to change without notice and Lonsec assumes no obligation to update the relevant document(s) following publication. Lonsec receives a fee from the Fund Manager for researching the product(s) using comprehensive and objective criteria. For further information regarding Lonsec’s Ratings methodology, please refer to our website at: [read http://www.lonsecresearch.com.au/research-solutions/our-ratings](http://www.lonsecresearch.com.au/research-solutions/our-ratings). This fund is reviewed by Lonsec. For more information, please speak to your financial planner.

