

MEDIA RELEASE

5 December 2023

NEW

‘Highly Recommended’ – six years in a row

Zenith Investment Partners (Zenith) has once again awarded the PAN-Tribal Global Equity Fund its highest possible rating

PAN-Tribal Asset Management today announced its PAN-Tribal Global Equity Fund has once again maintained its Highly Recommended rating following Zenith’s recent review of the global equity fund sector.

This is the sixth year the Fund has held this rating.

Managed by New York-based Davis Advisors, the PAN-Tribal Global Equity Fund provides a style-neutral, currency-unhedged and benchmark unaware international equities exposure.

In its research report, Zenith commented that its conviction in the Fund “is underpinned by the high regard we hold for the depth and quality of the investment team.”

The research house also noted its positive view of the Davis Advisors’ investment process, observing that it has been successfully and consistently implemented since 1969.

Zenith has met with several members of the investment team and commented that the research house considers the team to be “high calibre” which it views as “a key competitive advantage for the Fund”.

Commenting on portfolio manager Danton Goei, the report states: “Zenith rates Goei as a strong and highly experienced investor.”

Further, the research house notes Goei’s involvement in the management of the Fund since its inception as a positive factor.

PAN-Tribal Asset Management CEO Colin Woods says this rating highlights the importance of a quality investment team and a sound investment approach that is consistently applied.

“Despite another volatile year in global equity markets, that the Fund maintained this highest rating for the sixth year is a testament to the Davis Advisors team and their adherence to their investment process.”

“As we gather with supporters this week to celebrate nine years in business, this rating endorses our approach – to source the best investment products from the best investment managers, wherever they’re located.”

The PAN-Tribal Global Equity Fund is available on most major platforms, including AMP North, BT Panorama, Colonial FirstWrap, HUB24, Macquarie Wrap, MLC Wrap, Navigator, Netwealth and Praemium.

Since the PAN-Tribal Global Equity Fund was launched in 2015, PAN-Tribal’s line up has been expanded to include the Ashmore Emerging Markets Equity Fund, the ATLAS Infrastructure Australian Feeder Fund and the Barwon Global Listed Private Equity Fund.

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FOR MORE INFORMATION

Colin Woods – CEO

PAN-Tribal Asset Management

colinwoods@pantribal.com.au

0410 499 357

ABOUT PAN-TRIBAL ASSET MANAGEMENT

The philosophy underpinning PAN-Tribal Asset Management (PAN-Tribal) is to create wealth for investors by sourcing the best financial products from the best investment managers worldwide and backing that with first- rate service and support.

A client-centric focus is at the heart of the business – this flows from PAN-Tribal through to the investment managers we partner with.

We will continue to build PAN-Tribal's product offering around clients' greatest needs, to provide breadth of asset management capabilities across a range of asset classes and investment strategies.

To do this, an extensive global search and selection process is ongoing, to identify talented asset managers that offer quality products differentiated from those already available to Australian investors.

This focus on delivering a range of quality financial products by partnering with the world's best is encapsulated in our name... the bringing together of a diverse range of quality investment managers and financial products.

www.pantribal.com.au

The Zenith Investment Partners (ABN 27 103 132 672, AFS Licence 226872) ("Zenith") rating (assigned November 2023) referred to in this piece is limited to "General Advice" (s766B Corporations Act 2001) for Wholesale clients only. This advice has been prepared without taking into account the objectives, financial situation or needs of any individual, including target markets of financial products, where applicable, and is subject to change at any time without prior notice. It is not a specific recommendation to purchase, sell or hold the relevant product(s). Investors should seek independent financial advice before making an investment decision and should consider the appropriateness of this advice in light of their own objectives, financial situation and needs. Investors should obtain a copy of, and consider the PDS or offer document before making any decision and refer to the full Zenith Product Assessment available on the Zenith website. Past performance is not an indication of future performance. Zenith usually charges the product issuer, fund manager or related party to conduct Product Assessments. Full details regarding Zenith's methodology, ratings definitions and regulatory compliance are available on our Product Assessments and at <https://www.zenithpartners.com.au/our-solutions/investment-research/fund-researchregulatory-guidelines/>

