

Allan Gray Australia, Level 2, Challis House, 4-10 Martin Place, Sydney NSW 2000 P: +61 2 8224 8604 E: clientservices@allangray.com.au

FOR IMMEDIATE RELEASE

## ALLAN GRAY AUSTRALIA MAINTAINS HIGH RATINGS

*Allan Gray Australia Equity Fund and Stable Fund maintain the highest ratings awarded by Lonsec – ‘Highly Recommended’*

A ‘Highly Recommended’ rating indicates that Lonsec “has very strong conviction that the financial product can generate risk adjusted returns in line with relevant objectives.” The report notes that the Allan Gray Australia Equity Fund (**Equity Fund**) applies a “staunch, contrarian investment strategy and the Equity Fund has delivered strong risk-adjusted returns over the long term.”

When making an assessment on each of the Equity Fund and the Allan Gray Australia Stable Fund (**Stable Fund**), Lonsec highlighted a number of key strengths including that “the investment team is highly educated with a diverse range of industry and academic backgrounds. They exhibit strong buy-in to the firm’s investment philosophy and are strongly aligned with end investors.” The recently released Equity Fund report notes that Allan Gray Australia is “far more ‘benchmark unaware’ than the majority of fund managers in the Lonsec value peer group” and continued that they consider the Allan Gray Australia “relatively unconstrained research mandate to be a strong differentiating feature”. In summary, Lonsec commented that the “contrarian nature of the strategy holds intuitive appeal and continues to demonstrate superior peer-relative returns over the very long term of 10 years.”

With regards to the Stable Fund, ‘Lonsec believes the Stable Fund offers investors a genuinely differentiated offering that is contrarian and highly opportunistic, and has delivered strong risk-adjusted returns over the long term.’

Says Allan Gray Australia Investment Specialist, Julian Morrison: “These continued strong ratings are testament to the highly focused contrarian investment approach that Allan Gray has been operating in Australia for over fifteen years. We are extremely proud of the continued hard work and discipline of the whole team at Allan Gray Australia who work together to deliver on our purpose of building long-term wealth for our clients.”

A detailed list of our high ratings is available for financial planners by [visiting our adviser hub](#).

To arrange an interview with a member of the Allan Gray Australia Investment team or Julian Morrison, please contact Craig Badings on 0413 946 703 or [craig@senateshj.com.au](mailto:craig@senateshj.com.au).

**Media enquiries:** Craig Badings  
SenateSHJ  
02 8257 0200  
0413 946 703  
[craig@senateshj.com.au](mailto:craig@senateshj.com.au)

## About Allan Gray Australia

The Allan Gray investment philosophy is to take a contrarian approach, apply it consistently and invest for the long term. This approach was started by Dr Allan Gray who founded Allan Gray Ltd in Cape Town in 1973. Allan Gray in Australia and globally are privately owned and share the same investment philosophy. Allan Gray Australia was established in 2005 and launched its flagship Allan Gray Australia Equity Fund in 2006, followed by the Stable Fund in 2011 and the Balanced Fund in 2017. In 2018 Allan Gray Australia launched its Superannuation, Investments and Retirement solutions. Today Allan Gray Australia manages over \$8 Billion in funds under management. For more information, go to [allangray.com.au](http://allangray.com.au)

Past performance is not a reliable indicator of future performance. There are risks involved with investing and the value of your investments, including in the Allan Gray Funds, may fall as well as rise. This release constitutes general advice or information only and not personal financial product, tax, legal, or investment advice. It does not take into account the specific investment objectives, financial situation or individual needs of any particular person and may not be appropriate for you. Before deciding to acquire an interest in the Allan Gray Funds or making any other investment decision, please read the relevant disclosure document available on this website. We have tried to ensure that the information in this presentation is accurate in all material respects, but cannot guarantee that it is. Target Market Determinations (TMDs) for the Allan Gray Australia products can be found at [allangray.com.au/PDS-TMD-documents](http://allangray.com.au/PDS-TMD-documents). Each TMD sets out who an investment in the relevant Allan Gray Australia product might be appropriate for and the circumstances that trigger a review of the TMD.

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