

An integrated ESG approach that aligns with our values and beliefs

Beliefs Aligned With Our Investment Philosophy



A Long-Term Perspective

- Practices counter to the spirit of the law are unsustainable
- Practices which knowingly target vulnerable groups are unsustainable
- Practices which do not take reasonable steps to reduce significant harm are unsustainable



A Culture of Ownership

- Our success requires strong management of ESG issues
- Long term alignment supports strong ESG outcomes
- We actively engage with companies and other stakeholders



Independent Thinking

- Investment scenarios that capture ESG issues, such as climate
- Personal and societal values can shape research insights
- ESG considerations require dedicated and specialist capability

“Deep consideration of governance, social as well as environmental issues – coupled with active investment philosophy ownership – enhances investment, business and community outcomes”



At Merlon, we assess every potential investment with ESG factors in mind, because ESG plays a key role in determining the sustainability of free cash flow — our primary measure of value.

Investment Enquiries

To find out more about investing in the Merlon Australian Share Income Fund, peak to your financial planner or contact Andrew Fraser: afraser@merloncapital.com