

## investment approach

*Suitable for wholesale/sophisticated investors*

## SouthPeak Australian Equity Fund

### goal

**consistent alpha on top of equities in 'normal' years**

**greater outperformance in large equity falls**

### how

combine passive equities with systematic, dynamic, defensive volatility alpha

include systematic, dynamic, cost-effective protection

### about SouthPeak

**specialist volatility manager providing alpha and protection**

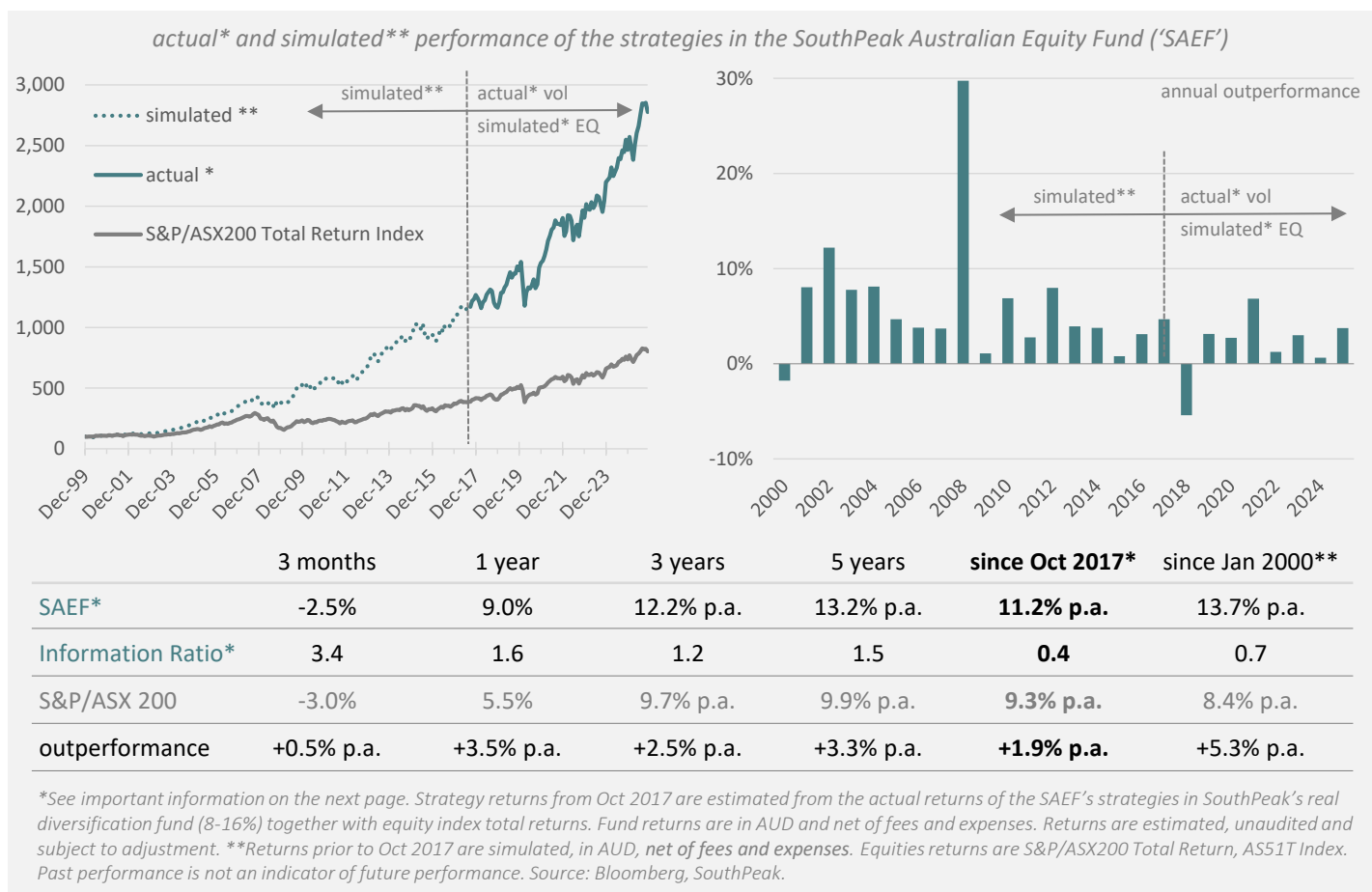
we aim to deliver persistent, uncorrelated outperformance

## why invest in the SouthPeak Australian Equity Fund?

designed for investors seeking to **consistently outperform** Australian equities with **lower drawdowns**

## SouthPeak experience

## strategies used since late 2017





## our investment approach

differentiated, defensive, systematic

SouthPeak seeks to **harvest attractive and differentiated returns from global volatility markets** using a proprietary systematic approach that has been used and refined over more than a decade.

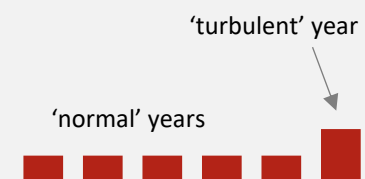
We use the tail-wind provided by the **volatility risk premium** (akin to selling insurance) to drive returns in 'normal' market conditions.

We then incorporate dynamic risk management and dedicated protection strategies, so the portfolio **becomes more defensive when markets become 'turbulent'**.

This combination aims to deliver consistent positive returns and strong performance in large equity shocks.

### target outperformance profile

consistent positive returns with strong performance in large equity falls



## why use volatility for outperformance?

we believe **predictability** and **sustainability** are paramount to generating consistent returns

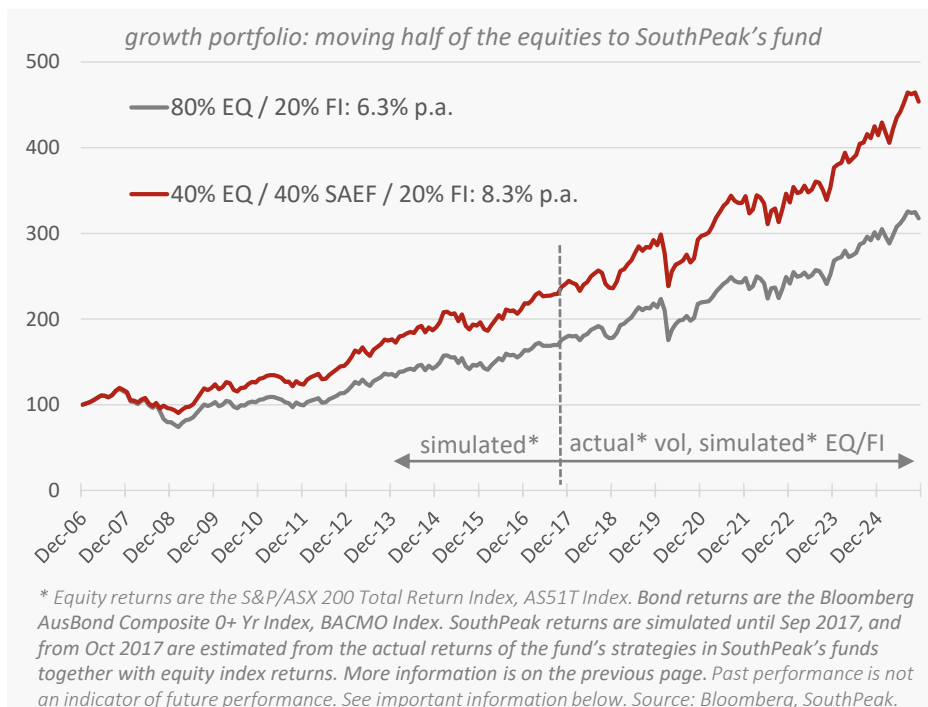
## role in portfolios

The aim of adding volatility strategies to growth assets is to create an investment with stronger expected returns while increasing defensiveness.

To illustrate, the graph compares a growth portfolio of Australian equities and bonds to a portfolio that moves half of its equities to the approach used in the SouthPeak Australian Equity Fund.

Over the period examined, incorporating the SouthPeak approach would have resulted in better performance in large equity falls (2008, 1Q2020, mid 2022, 2Q2025) while also earning higher returns over the whole period.

For further information see <https://www.southpeakim.com/insights>



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## Contact us

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INVESTMENT MANAGEMENT