

March 2021

Brought to you by Copia: Artisan Partners



Artisan Partners a Morningstar Fund Manager of the Year finalist as Global Discovery Fund hits \$70 million

Copia Investment Partners is pleased to announce that Artisan Global Discovery has been recognised as a finalist by Morningstar at its 2021 Fund Manager of the Year Awards (Undiscovered Manager category).

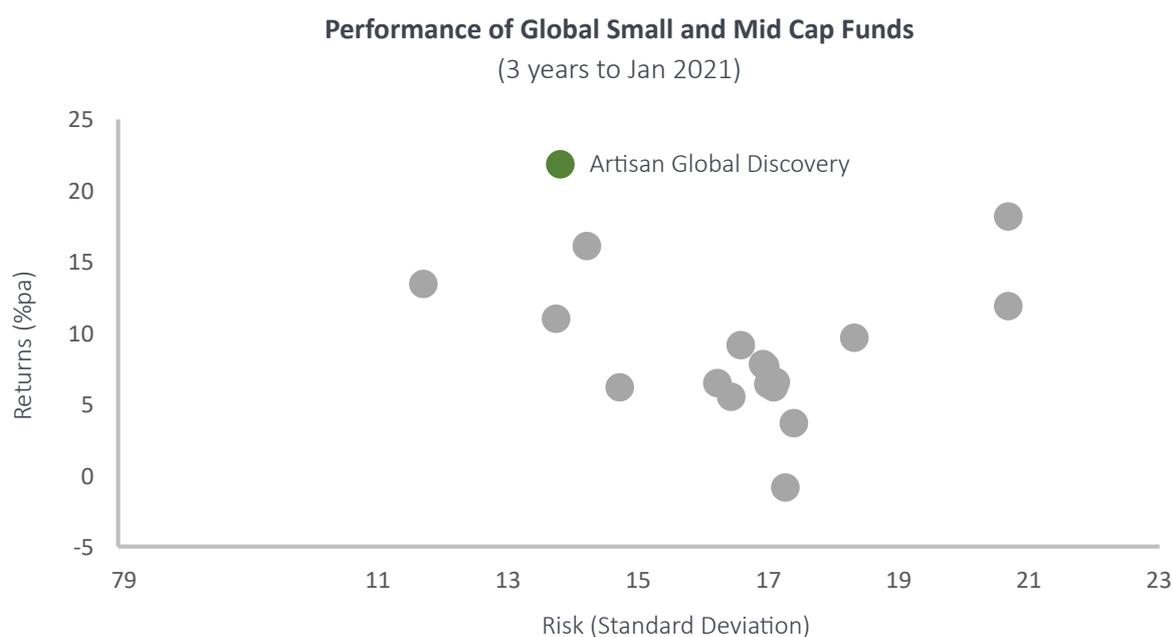
The award for Undiscovered Manager includes managers or specific funds with strong investment merit that Morningstar considers worthy of bringing to the attention of the retail market.

Artisan Partners is a US-based global fund manager with \$161 billion under management as at February 2021. Until recently, the fund manager was only available in Australia to institutional investors. That changed in June 2020 through a partnership with Australian fund distributor Copia.

A locally-domiciled unit trust version of the Artisan Global Discovery Fund (a global small and mid cap strategy - SMID) is now available, fully equipped with researcher ratings, platform inclusions and a much lower minimum investment of \$5,000 for direct investors.

Global Discovery interest growing, meeting specific needs

Despite increased competition in the asset class - with at least 12 new SMID strategies launched in the past three years - the Fund has continued to gain traction among researchers, platforms, advice groups and investors. In March 2021, the Fund reached \$70 million under management, with a substantial pipeline for new investment.



Source: Morningstar. Peer group includes funds included in the Morningstar Global Small Companies and Mid Cap sectors. Past performance is not a reliable indicator of future performance. The performance of "Artisan Global Discovery" has been calculated from the inception of the Artisan Global Discovery strategy on September 1, 2017 and adjusted for the fee structure of the Artisan Global Discovery Fund. See full disclaimer on page 3.

Copia is experiencing increasing interest for Artisan Partners for four main reasons:

1. More investors are recognising the need to invest in innovative companies and many with more attractive valuations are outside of Australia. The Artisan Global Discovery Fund may provide a viable option for portfolio diversification particularly where portfolios have historically been underrepresented to global mid and small caps.
2. The Artisan Partners 24-person Growth Team managing the Fund is significantly larger than many peers. Depth of resources may make a meaningful difference in stock selection and performance outcomes particularly in the SMID asset class where public information is less widely available (compared to large caps), and more feet 'on-the-ground' may allow greater coverage when it comes to in-house fundamental research.
3. While the Global Discovery Fund has over three years of performance track record, the underlying investment approach has a 25-year history by members of the same team, at the same firm. Very few SMID fund managers in Australia can match this tenure.
4. Track record is often cited as proof of an investment process, and pleasingly, the performance results support the Artisan Partners Growth Team investment thesis. The chart on page one compares performance and risk over three years to January 2021 (longest annual period available for the Fund), relative to the Fund's peer group.

The Fund has achieved the following milestones in terms of researcher ratings, award recognition and platform placement:

Research Ratings



"Zenith gains comfort from the team's long-standing investment process, which has produced highly attractive investment outcomes."

Zenith Product Assessment Report, 25 November 2020



"Experienced investment team with sound tenure, strong alignment with investors, well-structured investment process and well-suited investment philosophy"

Lonsec Product Review, 21 October 2020

Awards



Awards 2021
Nominee

Morningstar Awards 2021 (c). Morningstar, Inc. All Rights Reserved. Artisan Global Discovery nominated for Fund Manager of the Year — Undiscovered Category, Australia.

Platform Availability



BT Panorama

Powerwrap



netwealth

HUB²⁴



☎ 1800 442 129
✉ clientservices@copiapartners.com.au
🌐 www.copiapartners.com.au



DISCLAIMER This information has been prepared by Copia Investment Partners Limited (Copia) (AFSL 229316 , ABN 22 092 872 056) the issuer, distributor and responsible entity of the Artisan Global Discovery Fund. This document provides information to help investors and their advisers assess the merits of investing in financial products. We strongly advise investors and their advisers to read information memoranda and product disclosure statements carefully and seek advice from qualified professionals where necessary. The information on this document does not constitute personal advice and does not take into account your personal objectives, financial situation or needs. It is therefore important that if you are considering investing in any financial products and services referred to on this document, you determine whether the relevant investment is suitable for your objectives, financial situation or needs. You should also consider seeking independent advice, particularly on taxation, retirement planning and investment risk tolerance from a suitably qualified professional before making an investment decision. Neither Copia, nor any of our associates, guarantee or underwrite the success of any investments, the achievement of investment objectives, the payment of particular rates of return on investments or the repayment of capital. Copia publishes information on the document that is, to the best of its knowledge, current at the time and Copia is not liable for any direct or indirect losses attributable to omissions from the document, information being out of date, inaccurate, incomplete or deficient in any other way. Investors and their advisers should make their own enquiries before making investment decisions. © 2020 Copia.

The Artisan Global Discovery Fund invests all or substantially all of its assets in Artisan Global Discovery Fund (Fund), a sub-fund of Artisan Partners Global Funds plc. Artisan Partners Limited Partnership serves as investment manager to the Fund. Artisan Partnership Limited Partnership, its affiliates and Artisan Partners Global Funds plc (together, Artisan Partners) are not affiliated with Copia. Artisan Partners does not take any responsibility for the accuracy or completeness of the contents of these materials, any representations made herein, or the performance of the Artisan Global Discovery Fund offered by Copia. Artisan Partners disclaims any liability for any direct, indirect, consequential or other losses or damages, including loss of profits, incurred by you or by any third party that may arise from any reliance on these materials.

Artisan Partners is not responsible for, nor involved in, the marketing, distribution or sales of shares or interests in the Artisan Global Discovery Fund and is not responsible for compliance with any marketing or promotion laws, rules or regulations; and no third party, other than Copia, is authorised to make any statement about any of Artisan Partners' products or services in connection with any such marketing, distribution or sales. Past performance by any other funds or accounts advised by Artisan Partners, including the Fund into which the Artisan Global Discovery Fund invests, is not indicative of any future performance by the Artisan Global Discovery Fund. © 2020 Artisan Partners. All rights reserved.

The Zenith Investment Partners (ABN 27 103 132 672, AFS Licence 226872) ("Zenith") rating (assigned 24 September 2020) referred to in this document 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 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 <http://www.zenithpartners.com.au/RegulatoryGuidelines>

The rating issued 10/2020 is published by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec). Ratings are general advice only, and have been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The rating is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and Lonsec assumes no obligation to update. Lonsec uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2020 Lonsec. All rights reserved.