

MEDIA RELEASE

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AZIMUT HIGH CONVICTION SMA AWARDED RECOMMENDED RATING BY LONSEC

Investment research, ratings and asset consulting firm, Lonsec, has awarded investment consultant, AZ Sestante, a 'Recommending' rating for the Azimut Investments High Conviction Global Equities Separately Managed Account (SMA).

The SMA, which was previously rated investment grade, invests in a concentrated portfolio of 15-35 global stocks and aims to outperform the MSCI World ex-Australia Index by 2 per cent per annum, over the medium to long term.

It is currently available on the Hub24 and Mason Stevens platforms.

According to Antonio Vaiante, Head of Business Development at AZ Sestante, the group's large global team, depth of research and scale provided Australian investors and advisers with access to Azimut's best global ideas.

"The portfolio seeks to exploit market trends, strength of trends, and potential turning points to mark statistically favourable decisions," he said.

"The strategy is based on identifying stocks with the highest expected risk-adjusted returns in the current market conditions, applying both fundamental and quantitative approaches. This leads the portfolio to exhibit different styles and factors."

The Azimut Investments High Conviction Global Equities SMA is managed by Stefano Varvello, Head of Equity for the Discretionary Team. Varvello has over ten years' industry experience.

According to Lonsec, the portfolio has been upgraded to recommended following its more recent review, reflecting Azimut's well-resourced investment team and research capabilities, and the portfolio's outperformance over the benchmark since inception.

"The team applies a pragmatic investment process with clear linkage between stock research and the final portfolio," Lonsec stated.

AZ SESTANTE

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The Azimut Investments High Conviction Global Equities SMA was launched locally in March 2022 but the underlying strategy has a track record dating back to September 2017.

AZ Sestante has a strategic partnership to distribute the SMA product, managed by the global parent company Azimut. The dedicated portfolio management team at Azimut brings deep global expertise, a disciplined investment philosophy, and rigorous risk management practices to the strategy.

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About AZ Sestante

AZ Sestante is a specialist investment consultant focused on designing and managing a range of multi-manager model portfolios via SMAs, MDAs, and fund of funds.

www.azimutinvestments.com.au

The rating published on 04/2025 for the Azimut Investments High Conviction Global Equities Portfolio is issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). Ratings are general advice only and have been prepared without taking account of investors' 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 Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2025 Lonsec. All rights reserved.

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