

24 October 2023

Wilson Asset Management selects Equity Trustees for unit trust

Wilson Asset Management, an Australian investment manager for eight leading listed investment companies (LIC), has appointed Equity Trustees to be responsible entity for its new Wilson Asset Management Leaders Fund.

Andrew Godfrey, Executive General Manager, Corporate and Superannuation Trustee Services said: "We are excited to be selected as the responsible entity role for this unit trust by Wilson Asset Management and look forward to working closely with the team."

The Wilson Asset Management Leaders Fund will provide investors access to an actively managed investment portfolio, comprised of large-cap companies listed predominately on the ASX within the S&P/ASX 200 Index, with compelling fundamentals, a robust macroeconomic thematic and a catalyst.

Its aim is to provide investors a combination of capital growth and income over the medium to long term, in addition to preserving capital. The Fund will replicate the investment strategy of WAM Leaders (ASX: WLE), an Australian ASX-listed investment company which listed in 2016.

Wilson Asset Management was established in 1997 by Geoff Wilson and currently manages over \$5 billion of funds under management for over 130,000 retail investors. Wilson Asset Management is the investment manager for a diversified portfolio of listed investment companies investing in Australian large-cap equities, Australian small-to-mid-cap equities, global equities, Australian microcap equities, discounted asset opportunities and alternative assets.

"Our expertise and decades of experience in fund governance means we're well placed to work effectively with Wilson Asset Management," added Mr Godfrey.

MEDIA INQUIRIES

Alicia Kokocinski

General Manager – Marketing & Communications

03 8623 5396 / 0403 172 024

akokocinski@eqt.com.au

Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers. Equity Trustees is the brand name of EQT Holdings Limited (ABN 22 607 797 615) and its subsidiary companies, publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth, London and Dublin.