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Equity Trustees partners with Blackwattle Investment Partners as Responsible Entity for New Blackwattle Equity Income Fund

Equity Trustees has partnered with Blackwattle Investment Partners as Responsible Entity for the newly launched Blackwattle Equity Income Fund. This continues a partnership that has seen six funds brought to market since the investment manager commenced operations in 2023.

The Blackwattle Equity Income Fund offers access to an actively managed Australian equity income strategy focused on delivering consistent income across market cycles. Investing in listed Australian equities beyond traditional dividend-paying stocks, the strategy also utilises equity options to help generate regular income through a range of market conditions.

Andrew Godfrey, Executive General Manager of Corporate and Superannuation Trustee Services at Equity Trustees, said: "This partnership builds on our established relationship with Blackwattle and reflects the confidence we have in their investment capability and disciplined approach. We are pleased to support the launch of the Blackwattle Equity Income Fund and to continue working with a well established Australian fund manager that shares our commitment to strong governance, risk management and positive investor outcomes."

The Fund is constructed with a strong focus on risk awareness and income resilience, using active portfolio management and options strategies to help moderate volatility and manage downside risk while maintaining exposure to Australian equity markets.

Michael Skinner the Managing Director and CIO at Blackwattle, said:

- "We believe that Australia is shifting from saving to spending, for the growing retiree market, the next decade is about consistent and secure income that you can live on."
- "Our Equity Income Fund is built to generate resilient income, not chase it - combining dividends, franking credits and option premium income to target 6-12% p.a. while managing downside risk."

Rudi Minbatiwala, Portfolio Manager of the Fund, stated:

- "The retirement ask is clear: high income that is sustainable, stable, and accessible. That's the design brief behind our strategy."
- "Our Blackwattle Equity Income Strategy allows us to own high-quality companies first, then shape and enhance the outcome with options - aiming for steadier distributions at lower risk."

Blackwattle Investment Partners is a new generation, Australian investment manager, that centres its investment philosophy on a quality approach to investment management. With over 225 years of combined experience and A\$15 million in personal capital commitment, Blackwattle seeks to differentiate itself through investment excellence, transparency, and governance.



Andrew Godfrey concluded: “We look forward to continuing our partnership with Blackwattle as they expand their product offering, and to supporting investors through a structure that combines active management with strong oversight and governance.”

MEDIA INQUIRIES

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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, Sydney, Brisbane, Adelaide, and Perth.

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 as well as Responsible Entity (RE) and Custodian services for external Fund Managers.