



IOOF Multi-Manager Investments

MANAGER PROFILE

Manager: Defensive Equities Trust

Asset class: Australian Shares

Style: Defensive equities

The IOOF MultiMix investment team introduced a defensive equity portfolio to add value to the Moderate, Conservative and Capital Stable diversified IOOF MultiMix Trusts.

As its name suggests, this trust aims to provide equity like returns, but with much less volatility. The trust invests in an Australian managed volatility strategy, a low volatility strategy, an Australian income enhancer strategy and a quantitative, multi-factor strategy. The Trust is intended to outperform in down markets.

The current list of defensive equities trusts we support are:

- AllianceBernstein Investment Management Australia Limited
- Plato Investment Management Limited
- Lazard Asset Management
- Invesco Australia Limited

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