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## MEDIA RELEASE

### **Lonsec upgrades Tribeca Alpha Plus Fund to 'Recommended'**

The Tribeca Alpha Plus Fund has been upgraded to a 'Recommended' rating from research house Lonsec. This comes after the Fund was also upgraded to 'Recommended' by research house Zenith in June 2021.

The 'Recommended' rating indicates that Lonsec has strong conviction the financial product can generate risk adjusted returns in line with relevant objectives, and that the financial product is considered an appropriate entry point to this asset class or strategy.

The Fund has been managed by portfolio manager Jun Bei Liu of Sydney-based Tribeca Investment Partners since 2019 and offers investors an actively managed long/ short investment approach to Australian equities. It is distributed in the Australian and New Zealand markets by GSFM.

In its research report Lonsec said portfolio manager Jun Bei Liu is a capable investor and has taken full ownership of the implementation of the Fund's long-standing investment process.

It added the fund was a "differentiated product offering that uses an appealing blend of both quantitative and fundamental analysis.

"The Fund has delivered strong absolute and relative performance outcomes since Liu assumed lead decision making responsibility in 2019.

"The investment team has access to additional fundamental support from the manager's broader Australian Equity team," Lonsec said

GSFM CEO, Damien McIntyre, said that the upgraded ratings from both Lonsec and Zenith, along with the increased interest in the fund from the adviser community, was confirmation that the Fund is delivering on its return objectives for its investors.

"The Fund is achieving good support from the market, with the funds under management now exceeding \$1 billion. This is a testament to the skill of the portfolio management team and the support they receive from the broader Tribeca Australian Equity team.

"The Fund's performance has been strong in recent times, in both absolute and relative sense, achieving its investment objective over the past year despite the heightened volatility," he said.

Over the year to 31 August 2021, the Fund returned 31.1 per cent (after fees) to outperform the Benchmark by 2.9 per cent, while matching the peer median.

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For more information please contact:

Leeanne Bland

Phone: 0417 470 421

Email: [leeanne@pritchittpartners.com.au](mailto:leeanne@pritchittpartners.com.au)

*GSFM was established in July 2007 as a subsidiary of the Grant Samuel Group. In November 2016 CI Financial Corp (CI) purchased an 80 per cent stake in the business. CI is a diversified wealth management firm with fee-earning assets of CAD\$144.8 billion (as of 30 June 2021). GSFM specialises in marketing funds managed by high calibre local and international managers to Australian and New Zealand institutional and Australian retail investors.*

*Since 2007, GSFM has formed alliances with following investment managers to distribute investment products to Australian and New Zealand clients:*

- *New York based Epoch Investment Partners, Inc.*
- *Tribeca Investment Partners, a successful Australian boutique manager*
- *Payden & Rygel, a Los Angeles based independent investment management firm*
- *Munro Partners, an independent global equity manager*
- *London-based Man Group plc*
- *Redpoint Investment Management, a boutique equities manager based in Sydney*

*GSFM represents approximately \$16.4 billion funds under management (as at 31 July 2021). For more information about GSFM please visit the website: [www.gsfm.com.au](http://www.gsfm.com.au)*