

May 2022

## Investment option updates

This update contains the latest changes and announcements relating to our investments. Please review with the help of your financial adviser to understand if there are any impacts on your investments.

### Fund Manager Lazard Asset Management

Effective 1 June 2022, Lazard Asset Management’s CEO Ashish Bhutani will retire. The new CEO is Evan Russo.

### Fund Manager UBS Asset Management

From the end of May 2022, co-portfolio manager Gian Plebani has left UBS Asset Management. Jade Fu will take over Gian’s co-portfolio management responsibilities.

### Investment Pental Group

Effective date  
31 May 2022

Effective 31 May 2022, Pental Group issued new PDSs for their funds. The changes include:

- Updated RG97 fees and costs disclosure (under the new RG97 regime)
- Updated Standard Risk Measures - the formal notice and list of impacted funds is available [here](#).

Further information is available in the updated PDSs on the [Pental Group website](#).

In addition, effective 31 May 2022 Pental Group renamed the below investment option. The name change is to further reflect the investment framework and responsible investment priorities of the fund.

APIR code	Previous Investment option name	New Investment option name
RFA0025AU	Pental Horizon Fund	<a href="#">Pental Horizon Sustainable Australian Share Fund</a>

Further information is available in the updated PDS linked above.

Investment	APIR/ASX code	Effective date
BlackRock Diversified ESG Growth Fund	BAR0813AU	31 May 2022
BlackRock Diversified ESG Stable Fund	BAR0811AU	
BlackRock Tactical Growth Fund – Class D Units	PWA0822AU	

Effective 31 May 2022, BlackRock Investment Management (Australia) Limited made changes to the existing investments and strategic benchmarks for the below funds.

APIR code	Investment option
BAR0813AU	<a href="#">BlackRock Diversified ESG Growth Fund</a>
BAR0811AU	<a href="#">BlackRock Diversified ESG Stable Fund</a>
PWA0822AU	<a href="#">BlackRock Tactical Growth Fund – Class D Units</a>

Further information is available in the updated PDSs linked above.

Investment	APIR/ASX code	Effective date
Martin Currie Ethical Income Fund	SSB4946AU	31 May 2022

Effective 31 May 2022, a new PDS was issued for the investment option. The changes relate to updated guidelines around the types of securities excluded from the investment portfolio due to ESG considerations.

APIR code	Investment option
SSB4946AU	<a href="#">Martin Currie Ethical Income Fund</a>

Further information is available in the updated PDS linked above.

Investment	APIR/ASX code	Effective date
Capital Group New Perspective Fund (AU) (IDPS only)	CIM0006AU	31 May 2022

Effective 31 May 2022, a new PDS was issued for the investment option.

APIR code	Investment option
CIM0006AU	<a href="#">Capital Group New Perspective Fund (AU)</a>

Further information is available in the updated PDS linked above.

Investment	APIR/ASX code	Effective date
Dimensional World Equity Trust	DFA0035AU	On or around 27 May 2022
Dimensional World Allocation 70/30 Trust	DFA0029AU	
Dimensional World Allocation 50/50 Trust	DFA0033AU	
Dimensional World Allocation 30/70 Trust	DFA8313AU	

Effective on or around 27 May 2022, new PDSs will be issued for the below investment options. The changes reflect updates to the underlying funds of the investment options.

APIR code	Investment option
DFA0035AU	Dimensional World Equity Trust
DFA0029AU	Dimensional World Allocation 70/30 Trust
DFA0033AU	Dimensional World Allocation 50/50 Trust
DFA8313AU	Dimensional World Allocation 30/70 Trust

Further information is available [here](#).

Investment	APIR/ASX code	Effective date
Schroder Strategic Growth Fund – Wholesale Class	SCH0102AU	27 May 2022

Effective 27 May 2022, a new PDS was issued for the investment option. The changes relate to ESG and ethical considerations.

In addition, the investment option's name changed as below:

APIR code	Previous Investment option name	New Investment option name
SCH0102AU	Schroder Strategic Growth Fund – Wholesale Class	<a href="#">Schroder Sustainable Growth Fund- Wholesale Class</a>

Further information is available in the updated PDS linked above.

Investment	APIR/ASX code	Effective date
Woodside Petroleum Limited	WPL	25 May 2022

The Investment's name and ASX code changed effective 25 May 2022.

Previous ASX code	Previous name	New ASX code	New name
WPL	Woodside Petroleum Limited	WDS	Woodside Energy Group Ltd

<b>Investment</b> Medusa Mining Limited	<b>APIR/ASX code</b> MML	<b>Effective date</b> 10 May 2022
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The Investment's name and ASX code changed effective 10 May 2022.

<b>Previous ASX code</b>	<b>Previous name</b>	<b>New ASX code</b>	<b>New name</b>
MML	Medusa Mining Limited	X64	Ten Sixty Four Limited

**If you have any questions or would like further information, please contact Shadforth ClientFirst on 1800 931 792 or [portfolioservice@sfg.com.au](mailto:portfolioservice@sfg.com.au)**

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