

Media Release

Franklin Templeton Australia recognised for award-winning global equities SMA

Sydney, 27 August 2021: [Franklin Templeton Australia](#) has been named, for the second year in a row, the winner of the International Equities category at the 2021 IMAP Managed Account Awards.

The Institute of Managed Account Professionals (IMAP) is the only industry organisation for advisers, managers, providers and other businesses actively involved in offering or supporting Managed Accounts.

This annual award recognises the strong performance of the Franklin Concentrated Global Equity Ex-Australia Model Portfolio, a Separately Managed Account (SMA), with a long-only high conviction portfolio of global companies.

The Franklin Concentrated Global Equity ex-Australia Portfolio employs a disciplined, bottom-up, investment philosophy that seeks to deliver alpha over a full market cycle.

Franklin Templeton Australia Managing Director, Matthew Harrison said: “We are very proud to receive this prestigious award, for the second year in a row, that recognises our Franklin Global Growth team’s strong research-driven process and track record of investment excellence.

“This team has consistently demonstrated a high level of commitment to their investment methodology, implementing a bottom-up approach—which focuses on high-quality, sustainable growth companies—across a variety of market environments since 2004.

“We believe that investing in global equities offers investors the opportunity to access a broader investment universe, as well as enhanced diversification. This investment approach, which focuses on high-quality sustainable growth companies and a framework for diversification in the portfolio construction process, has enabled us to deliver strong risk-adjusted returns for our clients over the longer term.

“Putting clients first is our core value of Franklin Templeton and our award-winning managed accounts are part of a growing number of investment solutions we offer advisers. We look forward to continuing to provide access to our leading investment management solutions through the growing managed accounts sector,” said Mr Harrison.

Australian based portfolio manager Francyne Mu added: “Our rigorous investment approach results in a concentrated, best ideas portfolio of approximately 20 stocks. We look across all industries and countries for companies with sustainable business models that meet our growth, quality, and valuation criteria.

“We take a long-term perspective, researching stocks that we believe we can hold for three- to five-year periods as a company executes its growth model.

“The portfolio includes businesses that have solid growth prospects, strong management teams, and a sustainable competitive advantage, ranging from well-known to less discovered companies, adhering to the

investment team's strict quality and valuation metrics. Our preference for focused business models, in conjunction with a long-term investment horizon, allows for a differentiated approach, leading to good diversification across the portfolio," she added.

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About Franklin Templeton

Franklin Resources, Inc. [NYSE:BEN] is a global investment management organisation with subsidiaries operating as Franklin Templeton and serving clients in over 165 countries. Franklin Templeton's mission is to help clients achieve better outcomes through investment management expertise, wealth management and technology solutions. Through its specialist investment managers, the company brings extensive capabilities in equity, fixed income, multi-asset solutions and alternatives. With offices in more than 30 countries and approximately 1,300 investment professionals, the California-based company has over 70 years of investment experience.

In July 2020, Franklin Templeton completed the acquisition of Legg Mason, Inc. [NYSE:LM] and its specialist investment managers. The newly-combined organisation establishes Franklin Templeton as one of the world's largest independent, specialised global investment managers with a combined approximately AUD\$2.1 trillion in assets under management (AUM) across one of the broadest ranges of high-quality investment teams in the industry as of 30 June 2021.

For more information, please visit www.franklintempleton.com.au

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