

Plato

NET ZERO

Media Release

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PLATO ACHIEVES 'NET ZERO NOW' WITH LAUNCH OF NEW GLOBAL EQUITIES STRATEGY

In a first for the Australian funds management industry, Plato Investment Management has launched a global equities fund, managed with a net zero carbon footprint without the use of costly carbon credits.

The **Plato Global Net Zero Hedge Fund** aims to outperform the MSCI World Index, while maintaining a net zero carbon exposure using the calculation methodology recommended by the Task Force on Climate-related Financial Disclosures.

The Fund is an active extension long/short strategy that targets high carbon emitting listed companies via short positions, while taking long positions in companies with better than average carbon footprints.

Dr Don Hamson, Managing Director of Plato Investment Management, said the Fund has been launched to offer a 'net zero now' option for investment portfolios.

"We believe the race to net zero emissions will be the most important investment thematic over the next 30 years, and we think this unique strategy provides a way for investors to achieve net zero now, while gaining exposure to the greatest economic transition we'll likely see in our lifetimes.

"Climate change is an issue that our team and many of our clients feel strongly about and through the Plato Global Net Zero Fund we will be able to actively play a bigger part in driving corporate change while having the ability to starve polluters of capital by shorting the most egregious emitters.

The Plato Global Net Zero Hedge Fund's Co-Portfolio Managers are Dr David Allen Plato and Charles Lowe.

Dr Allen, who is also Plato Investment Management's Head of Long/Short Strategies, said the strategy gains a unique edge from Plato's established proprietary quantitative systems, along with the integration of hundreds of new ESG data points.

"We know an average sized SMSF invested in the ASX 200 requires 3135 trees to get to net zero, so I think this new Fund is a game-changer for those who want a simple solution to help them generate alpha while maintaining a net zero carbon footprint.

"Importantly the strategy is underpinned by Plato's proprietary quantitative systems which have been delivering strong outcomes for more than 15 years for investors ranging from self-funded retirees to superannuation funds.

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“For example, Plato’s Red Flags Model which incorporates more than 100 ESG red flags, including some 60 environmental inputs, plays a major role in portfolio construction. We check companies for a whole range of different signals using multiple data sources, which alone aren’t that powerful, but when they emerge together in numbers, we know we have a very valuable indicator.”

Since its inception on 1st of September, 2021, the Plato Global Net Zero strategy has delivered returns of 8.29%, compared to 4.38% for the MSCI World benchmark.

The Plato Global Net Zero Hedge Fund is open to retail and wholesale investors. For more information visit the [Plato Investment Management website](#).

Plato Investment Management is a member of Climate Action 100+ initiative, a signatory of the UNPRI, and a signatory of the Montreal Carbon Pledge. The firm has been actively and collaboratively engaging with companies on ESG issues including climate change, since the firm’s inception.

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About Plato Investment Management

Plato Investment Management is an investment management firm specialising in objective-based quantitative global and Australian equity investment solutions.

Founded in 2006, Plato now has more than A\$10 billion in funds under management for wholesale and retail investors, with strategies tailored to specific investor objectives of wealth accumulation, income generation and downside protection.

Plato is majority owned and operated by its investment staff and supported by minority equity partner, Pinnacle Investment Management Limited.

Plato Global Net Zero Hedge Fund Portfolio Manager Biographies

Dr David Allen

David joined Plato in January, 2018. Prior to joining Plato, David worked for JP Morgan Asset Management in London for 15 years. He ran the JP Morgan Europe Strategic Dividend Fund from 2006-2010. In 2007, David designed and launched the JP Morgan Europe Equity Plus active-extension fund which grew to €6 bn. In 2009, he became a Managing Director and the Head of Research.

In 2011, David embarked upon a PhD in Quantitative Finance at Cambridge University focussing on portfolio construction. On his return to JP Morgan in a full-time capacity in 2013, David launched the JP Morgan Europe Equity Absolute Alpha Market Neutral fund. In its first twelve months of operation, the fund returned 22.5%, and grew assets to €1 bn. winning the Eurohedge UCITS best fund award.

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David has a Bachelor of Business with First Class Honours from University of Technology, Sydney, and a PhD from Cambridge in Quantitative Finance.

Charles Lowe

Charles joined Plato in late 2019 as a senior quantitative analyst, focusing on the global market neutral strategy. He was previously at Macquarie for 12 years, most recently a Division Director in their Quant Hedge Funds team which he joined in 2012.

Prior to working within the QHF, Charles was a member of Macquarie Securities' quantitative research team in Sydney. He moved to New York in 2010 as a quant analyst focusing on North American equities.

Prior to joining Macquarie, Charles worked as an analyst at Commonwealth Bank of Australia, and subsequently Freehills. Charles holds a Bachelor of Commerce degree from the University of New South Wales, with an Actuarial Studies major.

For further comments from Dr David Allen or Dr Don Hamson, contact Jarrad Brevi, Media Manager for Plato and Pinnacle Investment Management.

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