

Media Release

## Nikko AM launches 'robo advice' platform in NZ

Nikko Asset Management New Zealand (Nikko AM NZ) is pleased to announce the launch of its digital investment advice platform 'GoalsGetter', bringing 'robo advice' to Kiwi investors.

The launch follows Nikko AM NZ being granted an exemption to the current law that says personalised advice to retail clients must be given by a natural person.

GoalsGetter is an easy-to-use digital investment platform that lets users set up, track and monitor their investment goals. Users can set multiple goals, view long-term projections based on different contributions and timeframes, and choose between many Nikko AM NZ Funds. For those who need more assistance choosing a fund, the platform can also recommend funds that are most suitable. However, investment decisions are still made by our award-winning investment team.

Nikko AM NZ Managing Director George Carter says GoalsGetter is the result of Nikko AM's ongoing commitment to provide Kiwis with progressive investment solutions.

"We're excited to provide Kiwis with an easy-to-use advice tool that can either complement an existing approach or start a journey of financial confidence, and which we believe can help more Kiwis reach their financial goals," says Carter.

The launch of GoalsGetter follows a nationwide survey by Nikko AM NZ that asked more than 1000 Kiwis aged 25-99 about their attitudes to investing, including their appetite for new investment products.

In the survey, half of all respondents (50%) said they would consider using **automated digital advice (robo advice)**. Support was stronger among younger Kiwis, but still significant across the board, including 67% of those aged 25-34 and 53% of those 35-44, as well as 46% of those aged 55-64, and 31% of those 65-99.

The survey also found keen interest in **goals-based online savings platforms**, which let you set up and track a goal or multiple goals, like GoalsGetter does. Overall, 59% of respondents said they would consider using one. Support was strong across most age groups, including 71% of those aged 35-44, 66% of those 25-34, and 65% of those 55-64.

"GoalsGetter combines the best of both concepts – robo advice and goals-based saving – and includes the convenience of signing in at any time, and the tools to help achieve your goals. All overseen by our very friendly – and very human – investment experts in Auckland," says Carter.

He says today's launch is just the latest chapter in Nikko AM's rich history.

"We have a long corporate history in New Zealand and today we manage more than \$5 billion in investments for many well-known and trusted New Zealand companies including community and charitable trusts, foundations, financial planners, banks, and insurance companies."

"Managing funds is what we do, and now with GoalsGetter we're pleased to be able to make our award-winning fund management services more readily available to Kiwis," Carter concludes.

**(Ends)**

---

For further information or to arrange an interview with George Carter, please contact:

Torben Akel  
09 306 5813  
[torben@nwkcom.co.nz](mailto:torben@nwkcom.co.nz)

#### About the Survey

The Nikko AM GoalsGetter Survey was undertaken by in November 2018 by Research Now. It was conducted online, with a total sample of 1012 respondents nationwide, including those aged 25-99, with household incomes of >\$70,000 (equivalent to ~70% of the gross national average).

#### About Nikko AM

Nikko AM NZ actively manages around NZD5.5 billion of investments\* for corporate superannuation schemes, community and charitable trusts, foundations, financial planners, banks, insurers, KiwiSaver Schemes, corporations, other fund managers and retail investors. Recent awards include Morningstar Fund Manager of the Year 2019 and 2018, FundSource Fund Manager of the Year 2018, and INFINZ Fund Manager of the Year (Bonds) 2018. It is part of one of the largest asset management companies in Asia, Nikko Asset Management (Nikko AM), which has US\$203 billion\* under management. Nikko AM NZ the only dedicated investment manager in NZ to be a part of a specialist global investment manager. \*All data as at 31 December 2018