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Media release

Nikko AM makes long-standing wholesale SRI Equity Fund available to retail and KiwiSaver investors

Actively managed fund leads evolution of socially responsible investing in Australasian equities

Hot on the heels of a revamp of its GoalsGetter platform, which guides Kiwi investors to understand, set and reach their personal investment goals, New Zealand fund manager and KiwiSaver provider Nikko AM NZ is now offering greater consumer choice with a retail and KiwiSaver version of its longstanding Wholesale Socially Responsible Investment (SRI) Equity Fund.

The wholesale fund, which adds a specific layer of SRI exclusions to Nikko AM's already ESG-integrated investment approach, was one of the first of its kind to be established in New Zealand. Companies excluded from the fund through Nikko AM's SRI filter today are those that derive over 10% of revenue from industries linked to adult entertainment, alcohol, controversial weapons / armaments, fossil fuels, gambling and tobacco.

Notwithstanding these constraints, the fund – which provides investors with exposure to around 30-35 companies including some Australian listed companies – has consistently over the last two decades exceeded the benchmark of outperforming the S&P/NZX50 Gross Index, delivering an average annual gross return of 12.48%.

“Since launching GoalsGetter three years ago, we’ve been committed to bringing institutional-level expertise and choice to the rapidly growing retail investment market,” says Nikko AM NZ Managing Director, George Carter.

“We’ve been managing an SRI strategy since 2001, so opening up access to the SRI Fund for individual investors and KiwiSaver members is the latest step in this exciting journey.”

The fund is actively managed by a dedicated SRI fund manager, with support from the wider Nikko AM equities team and global industry thought leaders who help assess, interpret and adjust the exclusions criteria. This is an important point of difference in the fast-moving SRI space when it comes to creating both economic and social value, says Carter.

“We believe that the best screening comes through active management. As a global fund manager with a philosophy of embedding ESG and SRI considerations into all our investment decision-making, we have the benefit of real-time experience and understanding of global trends and legislative and social developments. We use this advantage to engage with the management and boards of local companies on behalf of our investors to help drive positive change.”

The SRI Equity Fund is the second socially minded fund to be added to the now 20-strong Nikko AM retail fund portfolio in the last three months, following the launch of the uniquely philanthropic Freedom Fund last October. Both funds are available directly to New Zealand investors at www.goalsgetter.co.nz

Ends

Nikko AM NZ Managing Director, George Carter, is available for interview and further comment. Please contact Gez Johns, Network Communication: 027 808 8455, gez@nwkcom.co.nz

About Nikko Asset Management

With US\$282.5 billion* under management, Nikko Asset Management is one of Asia's largest asset managers, providing high-conviction, active fund management across a range of equity, fixed income, multi-asset and alternative strategies. In addition, its complementary range of passive strategies covers more than 20 indices and includes some of Asia's leading exchange-traded funds (ETFs).

Headquartered in Asia since 1959, Nikko Asset Management and its subsidiaries employ personnel representing around 25 nationalities, including approximately 200 investment professionals**. The firm has a presence through subsidiaries or affiliates in a total of 11 countries and regions. More than 400 banks, brokers, financial advisors and life insurance companies around the world distribute the firm's products.

The investment teams benefit from a unique global perspective complemented by the firm's historic Asian DNA, striving to deliver consistent excellence in performance. The firm also prides itself on its progressive, solution-driven approach, which has led to many innovative funds launched for its clients.

For more information about Nikko Asset Management and to access its investment insights, please visit the firm's [homepage](#).

* Consolidated assets under management and sub-advisory of Nikko Asset Management and its subsidiaries as of 30 September 2021.

** Including employees of Nikko Asset Management and its subsidiaries as of 30 September 2021.