



SG HISCOCK & COMPANY

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MEDIA RELEASE

### **SG Hiscock & Company partners with Morgan Stanley to launch global equity funds**

Melbourne-based boutique fund manager SG Hiscock & Company is partnering with leading international fund manager, Morgan Stanley Investment Management, to exclusively distribute their global equity funds in Australia.

The SGH Partnership Program has been launched with two funds:

- **Morgan Stanley Global Quality** (hedged and unhedged): This fund invests in high quality companies that have the ability to consistently compound shareholder returns over time, and
- **Morgan Stanley Global Sustain** (hedged and unhedged): This fund uses a similar methodology to the quality strategy but it emphasises the low carbon footprint, and excludes tobacco, gaming, adult entertainment, weapons, bulk commodities, fossil fuels, and gas/electrical utilities from the portfolio.

SG Hiscock & Company managing director, Stephen Hiscock, said: “We are particularly pleased to launch the SGH Partnership Program with Morgan Stanley, acting as their sole partner in Australia to distribute two of their global equity funds to the non-institutional market. Morgan Stanley is one of the world’s largest and most respected fund managers, and both funds have a strong track record of delivering resilient, above-market returns to investors.”

Morgan Stanley Investment Management Australia managing director, Daniel Vanden Boom, said: “SG Hiscock & Company has strong existing relationships among dealer groups and independent financial advisers which the Partnership Program will build upon. Our firm manages in excess of A\$10 billion for Australian institutional investors, across investment strategies in global equities, emerging markets equities, global fixed interest, global REITs, unlisted property and unlisted infrastructure. This includes an established client base in our Global Quality and Global Sustain strategies which we’ve been eager to offer to retail investors for some time. Partnering with SG Hiscock & Company means we can benefit from the longstanding experience of their business development team and their relationships with advisers”.

Investing in quality has underpinned the Morgan Stanley Investment Management team’s investment approach for over 30 years. Available via the Partnership Program, the two funds offer retail investors access to high-quality global equity strategies that have a track record of meeting investment needs such as capital growth, earnings visibility and reduced downside participation. Inherent to the investment approach is the belief that considering

environment, social and governance factors (ESG) is essential to compounding performance returns.

“The result is a high-conviction global equity portfolio that is strong on engagement, low on carbon and built on quality. These considerations are increasingly valued by investors, particularly in Australia,” said Mr Vanden Boom.

Equity Trustees Limited has been appointed Responsible Entity (RE) of the two Partnership Program funds. Equity Trustees’ head of global fund services and executive general manager corporate trust services, Harvey Kalman, said the business is proud to be continuing its longstanding partnership with SG Hiscock & Company, and now with Morgan Stanley Investment Management.

“Equity Trustees has grown to become the market leading RE provider in Australia. SG Hiscock & Company was one of our foundation clients when we were established 20 years ago. Enabling access to these funds provides the Australian public with access to a quality global manager via the distribution expertise of SG Hiscock & Company, and we’re pleased to be appointed as RE as a result of this new partnership,” he said.

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**For further information, please contact:**

Stephen Hiscock  
Managing director, SG Hiscock & Company  
(03) 9612 4600  
[shiscock@sghiscock.com.au](mailto:shiscock@sghiscock.com.au)

**About SG Hiscock & Company**

SG Hiscock & Company is a boutique fund manager specialising in high conviction actively managed investment strategies and Managed Discretionary Portfolios. SG Hiscock was established in Melbourne in 2001 by six of its principals and is entirely owned by staff. The head office is based in Melbourne and has a small office in Sydney. In 2016, the retail distribution and marketing for its funds was transitioned in-house and the firm now has a dedicated distribution team. In early 2019, SGH merged with highly regarded specialist discretionary portfolio manager, DMP Asset Management. SG Hiscock & Company commenced the SGH Partnership Program in June 2020. Combined with the SGH existing suite of Australian equity and Australian REITs (Real Estate Investment Trusts), the addition of the Partnership Program broadens our capabilities across Global REITs and Global Equities for Australian retail investors.

More information: [www.sghiscock.com.au](http://www.sghiscock.com.au)

**About Morgan Stanley Investment Management**

Morgan Stanley Investment Management (“MSIM”), together with its investment advisory affiliates, has more than 650 investment professionals around the world and US\$584 billion (A\$951 billion) in assets under management or supervision as of March 31, 2020. MSIM strives to provide outstanding long-term investment performance, service and a comprehensive suite of investment management solutions to a diverse client base, which includes governments, institutions, corporations and individuals worldwide. For further information about Morgan Stanley Investment Management, please visit [www.morganstanley.com/im](http://www.morganstanley.com/im).

**About Equity Trustees**

Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia’s leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for external Fund Managers.

Responsible Entity and Corporate Trustee Services are provided by Equity Trustees Limited (ABN 46 004 031 298) AFSL 240975 which is a subsidiary of EQT Holdings Limited (ABN 22 607 797 615), a publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane, Perth, Dublin and London.