

Media Release

Federation Alternative Investments II Fund receives endorsement from MyFiduciary research house.

- *A tick for investment team, style and fund accessibility*



July 18, 2023: In its latest Investment Governance assessment, [MyFiduciary](#), a leading New Zealand investment research group, has reviewed [Federation Alternative Investments II](#) ('F2') Fund against the Fi360 Global Fiduciary Standard of Excellence for investment managers.

MyFiduciary assessment report highlights: "Federation has demonstrated conformity to all the Fi360 Practices for Investment Managers that apply to its investment style, which highlights the firm's significant investment into its people and processes.

"Federation is still a relatively new and modestly sized business, but it has clear and established processes and operational rigour. This should provide current and potential investors confidence that it is well-structured, well-provisioned and adheres to the highest standards of governance and process.

"The F2 strategy provides investors with a better access point and liquidity terms than typically offered in private equity funds. It is an open-ended fund that offers monthly liquidity, albeit with a 5% per quarter limit, by holding cash or cash-like instruments and having the ability to use leverage.

"The fund may suit investors who have a sustainability criterion given the areas of focus in the product of clean power, provision of health and education related real estate, and companies meeting a social and economic need.

"This is a very experienced team, many of whom have worked together for many years and have built a track-record of successfully investing in private equity markets.

"Overall, we are comfortable that the significant experience and ability of the Federation investment team is supported by governance and processes of a similar standard."

The report adds: "Federation is selective about the sectors that they will invest into. They avoid investments in fossil fuels and other low ESG sectors and will be cautious about opportunities in consumer discretionary, manufacturing and retail. The preferred sectors are clean power, education, healthcare, ageing population, technology and financials and fintech. Their remit is Asia-Pacific but most investments will be in Australia.

"We find that the investment management and operations of Federation are of a high standard, as we would expect from a quality fund manager in the Australian market," notes MyFiduciary report.



Cameron Brownjohn, CEO of Federation adds “We are delighted to receive the report from MyFiduciary. The clients of MyFiduciary should have comfort in the thoroughness and professionalism of this assessment process.

“MyFiduciary rating comes on top of listing the Federation Alternative Investments II on the Apex NZ platform earlier in May and we are working with other NZ platforms for listing. For Federation this is a continuation of our ongoing work and connection with NZ advisers and private wealth managers to bring forward impressive private market ideas in an accessible manner.”

Read more: <https://federationam.com/our-funds/federation-alternative-investments-ii/>

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About Federation

Federation invests in businesses that meet economic and social needs. We aim to become Asia-Pacific’s leading investor in renewable energy, health and education real estate and operating companies with strong growth potential. Our team has a strong track record of working together over a number of years and offers unrivalled investment experience across these sectors.

The firm manages capital commitments of A\$1.4 billion for clients across the Asia Pacific region, including in Australia. Federation is a signatory to the United Nations Principles for Responsible Investing (UNPRI) and is certified by the Responsible Investment Association of Australasia (RIAA).

For more information please visit: <https://www.federationam.com/>

LinkedIn: <https://www.linkedin.com/company/federation-asset-management/>

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