

## Media Release

### Federation continues to deliver strong private equity returns for its investors



*(Image: Cameron Brownjohn, CEO Federation Asset Management)*

August 5, 2024: Capping off a round of successful initiatives over the first six months of the year, Federation Asset Management, a leading private equity firm, has delivered strong returns across its funds as part of its forward-looking investment strategy.

Federation Asset Management's flagship wealth management product, Federation Alternative Investments II (F2), has achieved an impressive 17.6% net unitholder return for the past 12 months\*, consistent with its performance targets. The fund offers investors a basket of assets that are non-correlated with their listed market investments.

This follows the recent acquisition of Australian equity release business Homesafe Solutions. Homesafe provides older homeowners to unlock the equity in their homes. The acquisition positions Federation to benefit from the rapid growth of the equity release market in Australia.

"Homesafe provides older Australians with the ability to monetise the latent equity value in their homes," says Cameron Brownjohn, CEO of Federation Asset Management. "It's a wonderful solution for that set of constituents and we think we can grow this into a profound market opportunity set almost in parallel with the way people have done similar things with businesses in Canada and the UK.

"It is attractive from an investment perspective as it's playing in the Australian residential real estate sector. The current total value of Australia's residential housing market today exceeds 10.4 trillion, presenting a compelling opportunity for investors."

Federation has also combined forces with Astris Advisory, a leading financial services operator in Japan with a significant investment that opens new avenues for growth beyond Australian borders.

"The beauty of Federation's portfolio is that we have intentionally tried to invest into businesses and assets that are inflation linked." Brownjohn says, "We want these businesses and assets to improve in value, regardless of what interest rates do. And regardless of what inflation does."

"Each of the Federation products is performing to plan," Brownjohn said.

#### *End notes*

*\*after fees, for the period ending 30 June 2024*

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**About Federation**

Federation invests in businesses that meet economic and social needs, with particular strengths in renewable energy, health and education real estate and businesses servicing an aging population and modernising world. The firm manages capital commitments of A\$2 billion for institutional and individual investors. 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/>

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