



MEDIA RELEASE

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Lonsec Retirement Managed Portfolios further extend income allocation to Talaria.

Lonsec Investment Solutions have announced an increased investment in the Talaria Global Equity Fund to its Retirement Managed Portfolios across their Conservative, Balanced and Growth portfolios, making Talaria a key holding in their income allocation. This is their third allocation increase in 12 months.

Lonsec said: “We have re-allocated some capital into Global Equities, where we have been underweight. We believe the additional allocation to Talaria Global Equity Fund supports the portfolios’ objectives to deliver growth and income.”

Talaria Chief Investment Officer Chad Padowitz said: “This is a great recognition of both our income generation and growth potential for 2021 and beyond. We’re delighted to continue to strengthen our relationship with Lonsec.”

Talaria is different from many equity managers in that it generates income from differentiated sources, not reliant entirely on dividends.

Over the last year, many companies globally have either cut or deferred their dividends, leaving retirees short of income. Talaria’s ability to generate income for investors is not constrained by these factors, and over the last 12 months has distributed 9.17% to investors.

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