



MEDIA RELEASE

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Lonsec increases Talaria Global Equity Fund allocation to its Retirement Managed Portfolios

Lonsec Investment Solutions have announced an increased investment in the Talaria Global Equity Fund to its Retirement Model Portfolios. The allocations are across their **Conservative**, **Balanced** and **Growth** portfolios.

Lonsec said: “The Lonsec Retirement portfolios have up until now been defensively positioned and underweight both Australian and Global Equities. However, given our more constructive views on risk assets discussed and agreed at our recent Asset Allocation Investment Committee meeting, along with an improving outlook for dividends, now is a good time to reduce the risk control elements within the portfolios and increase our positions in both Australian and Global equities.”

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.

Throughout 2020 many companies globally have either cut or deferred their dividends, leaving retirees short of income. This is likely to continue for some time with many companies not offering earnings or dividend guidance, and unemployment still at record levels in many countries.

Talaria’s ability to generate income for investors is not constrained by these factors, and for over a decade has distributed an average of over 8.0% per annum to investors.

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