



# Innovative solutions for New Zealand investors

**Betashares is a leading Australasian fund manager serving more than 1M clients. The Betashares group collectively manages over NZ\$38bn in assets.\***

\*As of 31 January 2024.

Since our inception in 2009, our aim has been to make investing accessible and affordable, guided by our core principles: simplicity, cost-effectiveness and transparency.

With a history of innovation and a reputation as a pioneer in the funds management industry we are focused on delivering long term value to investors, via both low-cost market-cap weighted funds, and 'smart beta' investment strategies that target outperformance, but at a lower fee level than active managers. We also offer a market-leading range of ethical solutions for investors looking to align their investments with their values.



## **Betashares NZ funds**

The Betashares group has been supporting New Zealand advisers for over 10 years via ASX-traded ETFs managed by our Australian affiliate.

Following the establishment of Betashares Capital NZ Limited, we are now pleased to offer a range of unlisted portfolio investment entity (PIE) funds in New Zealand. The range is now accessible on Adminis, Apex Group, NZXWT, Consilium Wrap and other leading platforms.

# PIE funds and their benefits

The PIE fund structure can provide tax benefits to investors, as it enables investors to pay tax on the investment income from the Fund at a rate that, for most investors, is lower than their personal income tax rate.

Betashares funds deliver a range of cost-effective investment solutions to New Zealand investors. The current range includes the following products:



## Core ethical funds

- **Betashares Global Sustainability Leaders Fund**

Access a diversified portfolio of sustainable, ethical companies from a broad range of global locations.

- **Betashares Global Sustainability Leaders Fund (NZD Hedged)**

Access a diversified portfolio of sustainable, ethical companies from a broad range of global locations, hedged into NZ dollars.

- **Betashares Australian Sustainability Leaders Fund**

Invest in a diversified portfolio of sustainable, ethical Australian companies.



## Australian equities

- **Betashares Australia 200 Fund**

Gain exposure to the largest 200 companies listed on the ASX, with annual fund charges of only 0.23%\*.



## Global 'quality' companies

- **Betashares Global Quality Leaders Fund**

Access a diverse portfolio of 150 global companies ranked by highest quality score.



## Credit income

- **Betashares Australian Investment Grade Corporate Bond Fund (NZD Hedged)**

Generate attractive income from a portfolio of high quality Australian corporate bonds, hedged into NZ dollars.

# Enhancing the Adviser Value Proposition

Betashares is committed to partnering with financial advisers. Our Adviser Services team can assist with a number of bespoke services including:

- Portfolio analytics and construction services
- Education and insights
- Practice development materials and support
- Responsible investing tools and expertise

## For more information

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\*Other costs, such as transaction costs, may apply. See PDS for more information.

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