

MEDIA RELEASE

28 January 2020

NEW

PAN-Tribal Asset Management and Barwon Investment Partners sign distribution agreement

PAN-Tribal Asset Management and Barwon Investment Partners are pleased to announce they have signed an exclusive distribution agreement for the Australian marketplace.

Founded in 2006, Barwon Investment Partners focuses on providing innovative investment solutions in the private equity and property asset classes for institutional and wholesale clients.

A central tenet of PAN-Tribal Asset Management's philosophy is to provide breadth of asset management capabilities across a range of asset classes and investment strategies.

Commenting on the agreement, PAN-Tribal Asset Management CEO Colin Woods said, "We're delighted to work with Barwon."

"The team has impressive investment credentials with extensive experience and, importantly, the partners commit their own capital alongside investors."

"This alignment of interests is consistent with our approach; co-investment, being exposed to the same risks and reaping the same rewards as investors is central to our business."

Sam Armstrong, Founding Partner and Head of Private Equity at Barwon Investment Partners said, "Over the past 12 years, the team at Barwon has built a successful alternatives boutique focused on the institutional market, family offices and wealth managers."

"Signing this distribution agreement with PAN-Tribal Asset Management is a natural progression, to enable a broader range of investors to gain access to an asset class that previously has predominantly been available only to larger institutions."

In the first instance, PAN-Tribal Asset Management will distribute the Barwon Global Listed Private Equity Fund, which has a 12-year track record and has delivered investors 14%* per annum for the past 10 years.

The fund invests in a portfolio of listed private equity funds (including buyouts, growth capital, and venture capital) together with listed alternative asset managers. The fund also invests in private equity-backed listed companies.

It typically invests in a portfolio of 15 to 20 securities at any one time, seeking the best opportunities from the investment universe while providing diversification across geographies, deal stages and vintages.

"PAN-Tribal Asset Management aims to create wealth for investors by sourcing the best financial products from the best investment managers worldwide," said Woods.

"At a time when traditional asset classes are challenged, I believe the Barwon Global Listed Private Equity Fund will fill an important gap for Australian investors."

**at 31 December 2019, net of fees. Past performance is not an indication of future performance.*

FOR MORE INFORMATION

Colin Woods – CEO

PAN-Tribal Asset Management

colinwoods@pantribal.com.au

0410 499 357

Sam Armstrong – Founding Partner and Head of Private Equity

Barwon Investment Partners

sam.armstrong@barwon.net.au

ABOUT PAN-TRIBAL ASSET MANAGEMENT

The philosophy underpinning PAN-Tribal Asset Management (PAN-Tribal) is to create wealth for investors by sourcing the best financial products from the best investment managers worldwide and backing that with first-rate service and support.

A client-centric focus is at the heart of the business – this flows from PAN-Tribal through to the investment managers they partner with.

PAN-Tribal's intention is to build a product offering around clients' greatest needs, to provide breadth of asset management capabilities across a range of asset classes and investment strategies.

To do this, an extensive global search and selection process is undertaken to identify talented asset managers that offer quality products differentiated from those already available to Australian investors.

PAN-Tribal's focus on delivering a range of quality financial products by partnering with the world's best is encapsulated in the firm's name... the bringing together of a diverse range of quality investment managers and financial products.

ABOUT BARWON INVESTMENT PARTNERS

Barwon Investment Partners was founded in 2006 and is headquartered in Sydney, Australia. Its focus is on creating innovative investment solutions in the private equity and property asset classes for institutional and wholesale clients.

Barwon has five partners: Rob Morrison, Sam Armstrong, Peter Connors, Tom Patrick and Kate Hayward, each with extensive experience in investment management and financial services. Barwon has a highly experienced investment team and a platform for investing globally.

Barwon's investment philosophy focuses on alternative investment strategies and funds. The team believes that reduced competition and greater inefficiencies in these sectors offer Barwon's clients the opportunity for superior risk-adjusted returns. Barwon employs an active investment style, assessing potential investments on the basis of their fundamental value using rigorous research and analysis.

Barwon's clients include institutional and wholesale investors located in Australia and internationally.

