

Research Schedule

ISSUE DATE: 19-03-2019

SECTORS CURRENTLY UNDERWAY	LEAD ANALYST	MEETINGS COMMENCED	STATUS	PROJECTED COMPLETION DATE
GLOBAL EQUITIES LARGE CAP SMALL CAP LONG SHORT	RUI FERNANDES ADRIAN HOE	01/10/2018	FUND REPORT PUBLISHING UNDERWAY	30/04/19
MULTI ASSET DIVERSIFIED MULTI-MANAGER VARIABLE GROWTH	DEANNE BAKER JUDE MCDONNELL	01/10/2018	FUND REPORT PUBLISHING UNDERWAY	30/04/19
EQUITY ETFS AND PASSIVE FUNDS	PETER GREEN	01/10/2018	FUND REPORT PUBLISHING UNDERWAY	30/04/19
AUSTRALIAN EQUITIES (SMALL CAPS)	SHAILESH JAIN	01/11/2018	FUND REPORTS PUBLISHED SECTOR REVIEW IN PROGRESS	30/04/19
INCOME AUSTRALIAN FIXED INTEREST DIVERSIFIED FIXED INTEREST ENHANCED CASH AND DEPOSITS ALTERNATIVE INCOME MORTGAGE FUND	JUDE MCDONNELL PRASANKA RAJAPAKSHA	01/02/2019	SITE MEETINGS COMPLETED PEER REVIEW IN PROGRESS	30/06/19
A-REITS	KEVIN PROSSER	01/02/2019	REPORT DRAFTING UNDERWAY	30/04/19
LISTED INFRASTRUCTURE	KEVIN PROSSER	01/03/2019	SITE VISITS UNDERWAY	30/04/19
GLOBAL EMERGING MARKETS	SIMONE GAVIN	01/03/2019	INTERIM UPDATE UNDERWAY – SITE VISITS WILL OCCUR IN CONJUNCTION WITH GLOBAL EQUITIES REVIEWS COMMENCING OCTOBER 2019	15/05/2019
SUPERANNUATION OPTIONS	JUDE MCDONNELL DARRELL CLARK	15/02/2019	SITE VISITS UNDERWAY	30/06/19
INVESTMENT BONDS	AMY HO	01/03/19	PEER REVIEW UNDERWAY	30/04/19
SRI AUSTRALIAN EQUITY GLOBAL EQUITIES	TONY ADAMS	01/05/2019 01/10/2019	- INTERIM UPDATE UNDERWAY	15/10/2019 30/04/2019

Note: SRI and ESG funds will be reviewed at the same time as their respective asset class focus.

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FUTURE SECTORS	LEAD ANALYST	CLOSE DATE FOR SECTOR INCLUSION	PROJECTED START DATE	PROJECTED COMPLETION DATE
AUSTRALIAN EQUITIES LARGE CAP LONG SHORT SPECIALISED RESPONSIBLE INVESTMENT SMA	SHAILESH JAIN TONY ADAMS	15/03/19	01/05/19	15/10/19
ALTERNATIVES	JAMES KIRK	15/03/19	01/05/19	15/10/19
G-REITS	KEVIN PROSSER	15/03/19	01/05/19	15/10/19
INCOME ALTERNATIVE INCOME (HIGH) EMERGING MARKET DEBT GLOBAL FIXED INTEREST UNCONSTRAINED BONDS RESPONSIBLE INVESTMENT SMA	JUDE MCDONNELL PRASANKA RAJAPAKSHA	15/03/19	01/05/19	15/10/19
INCOME – INDEX, ETF	PETER GREEN	15/03/19	01/05/19	15/10/19
MULTI-ASSET DIVERSIFIED MULTI-MANAGER VARIABLE GROWTH MULTI-ASSET INCOME SUPERANNUATION RESPONSIBLE INVESTMENT SMA	JUDE MCDONNELL DARRELL CLARKE TONY ADAMS	15/08/19	15/10/19	30/04/20
RETIREMENT PRODUCTS	JUDE MCDONNELL DARRELL CLARK	15/08/19	15/10/19	30/04/20
INVESTMENT BONDS	AMY HO	15/08/19	15/10/19	30/04/20
GLOBAL EQUITIES LARGE CAP SMALL CAP DEVELOPED MARKETS EMERGING MARKETS LONG SHORT RESPONSIBLE INVESTMENT SMA	ADRIAN HOE SIMONE GAVIN TONY ADAMS	15/08/19	15/10/19	30/04/20
AUSTRALIAN AND GLOBAL EQUITIES – INDEX, ETF	PETER GREEN	15/08/19	15/10/19	30/04/20
DIRECT ASSETS	KEVIN PROSSER		AS REQUIRED	
LICS, LITS, SMAS	DEPENDENT ON UNDERLYING ASSET CLASS (SEE ABOVE)		DEPENDENT ON UNDERLYING ASSET CLASS (SEE ABOVE)	
AUSTRALIAN EQUITIES LARGE CAP SMALL CAP LONG SHORT SPECIALISED RESPONSIBLE INVESTMENT	SHAILESH JAIN TONY ADAMS	15/03/20	01/05/20	15/10/20
INCOME AUSTRALIAN, GLOBAL AND DIVERSIFIED FIXED INTEREST ALTERNATIVE INCOME & ALTERNATIVE INCOME (HIGH) EMERGING MARKET DEBT UNCONSTRAINED BOND RESPONSIBLE INVESTMENT	JUDE MCDONNELL PRASANKA RAJAPAKSHA	15/03/20	01/05/20	15/10/20
AREITS	KEVIN PROSSER	15/03/20	01/05/20	15/10/20
LISTED INFRASTRUCTURE	KEVIN PROSSER	15/03/20	01/05/20	15/10/20

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Points of Contact

The Research schedule provides a guide for the annual timing of fund reviews. Fund Managers wanting to include additional products in the regular annual review process should contact Tom Akay. Fund reviews occurring outside of the regular cycle (Out of Cycle) may be considered, subject to availability and existing rating commitments.

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