- Perpetual Asset Management recognised in industry awards

Perpetual Asset Management Australia industry awards

favicon.jpg
By Perpetual Asset Management
2 June 2025



Perpetual Group's investment teams are often recognised by the Australian investment industry's most-respected research houses and publishers.

Here, you'll find updates on our latest awards and nominations, underlining the dedication of Perpetual's investment teams.

2026

2026 Zenith Fund Awards

Perpetual is a finalist in three categories:

- Australian Fixed Interest
- Multi Asset (Real Return)

Pendal – part of Perpetual Group – was nominated in the following categories:

- Sustainable and Responsible Investments (Income)

2026 Financial Newswire / SQM Research Fund Manager of the Year

Perpetual won in one category and was a finalist in four others:

- **Australian Fixed Income** – Perpetual High Grade Floating Rate Fund – Class R *(winner)*
- **Australian Fixed Income** – Perpetual Active Fixed Interest Fund *(finalist)*
- **BDM of the Year** - Alyce Mattman *(finalist)*

Pendal – part of Perpetual Group – was nominated in the following categories:

- **Australian Fixed Income** – Pendal Dynamic Income Fund *(Highly Commended)*
- **A-REITs** – Pendal Property Securities Fund *(finalist)*

2026 Lonsec / *Money Management* Fund Manager of the Year Awards

Perpetual won one category and was a finalist in four others:

- **Fund Manager of the Year** – Perpetual *(finalist)*
- **Specialised Income Fund of the Year** – Perpetual Diversified Income Fund *(winner)*
- **Australian Bond Fund of the Year** – Perpetual Active Fixed Interest Fund *(finalist)*
- **Responsible Investment Fund of the Year** – Perpetual ESG Credit Income Fund *(finalist)*

Pendal – part of Perpetual Group – was nominated in the multi-asset category:

- Multi-Asset Diversified Fund of the Year – Pendal Monthly Income Plus Fund *(finalist)*

2025

2025 Zenith Fund Awards

Perpetual was a finalist in three categories:

- Fund Manager of the Year
- Multi Asset (Real Return)
- Sustainable and Responsible Investments (Income)

2025 Australian Alternative Investment Awards

Perpetual won one category and was a finalist in another:

- Best Alternative Fixed Income and Credit Fund – Perpetual Pure Credit Alpha Fund *(winner)*
- Best Market-Neutral Fund – Perpetual Pure Equity Alpha *(finalist)*

2025 *Financial Newswire* / SQM Fund Manager of the Year

Perpetual was nominated in two categories:

- Australian Fixed Income – Perpetual Active Fixed Interest Fund *(finalist)*
- Long/Short Equities – Perpetual SHARE-PLUS Long-Short Fund, Perpetual Pure Equity Alpha Fund *(finalist)*

2025 *Financial Standard* Investment Leadership Awards (ILA)

This year, the team was nominated across five categories at the ILA and won in two:

- Fixed income, aggregate bonds – Perpetual Active Fixed Interest Fund *(winner)*
- Fixed income, credit/absolute returns – Perpetual Wholesale Credit Income Fund + Perpetual Diversified Income Fund *(winner)*
- Australian equities, high active risk – Perpetual ESG Australian Share Fund
- Australian equities, small cap – Perpetual Wholesale Smaller Companies Fund
- Australian equities, ESG – Perpetual ESG Australian Share Fund

The awards span 22 categories across seven major asset classes, identifying and awarding the organisations that have proven to be best in class and which consistently add value to investors.

2025 Lonsec / *Money Management* Fund Manager of the Year Awards

The team was nominated across various categories at the prestigious Fund Manager of the Year Awards, winning in one:

- Diversified Fixed Income – Perpetual Diversified Income Fund *(winner)*
- Australian Large Cap Equity – Perpetual Industrial Share Fund
- Responsible Investment – Perpetual ESG Australian Share Active ETF (ASX: GIVE)
- Australian Fixed Income – Perpetual Dynamic Fixed Income Fund
- Fund Manager of the Year (overall)

Money Management draws from the practical, actionable insights of Lonsec Research & Ratings to help recognise the industry's top fund managers – from the rising stars and leaders of tomorrow to the most senior professionals, boutique funds and heavyweights.

2025 Morningstar Australia Awards

This year, the team was nominated in three categories:

- Fund Manager of the Year (Overall)
- Fund Manager of the Year (Fixed Interest) – Perpetual Diversified Income
- Fund Manager of the Year (Sustainable Investing) – Perpetual ESG Credit Income

Now in its 25th year, the awards recognise and celebrate the best of the Australian fund management profession and are selected by Morningstar's Manager Research analysts.

2024

2024 Lonsec / *Money Management* Fund Manager of the Year Awards

Perpetual Asset Management was a finalist in five categories, including Fund Manager of the Year:

- Fund Manager of the Year – Perpetual Asset Management
- Australian Large Cap Equity Fund of the Year – Perpetual SHARE-PLUS Long-Short Fund
- Australian Small Cap Equity Fund of the Year – Perpetual Smaller Companies Fund
- Australian Fixed Income Fund of the Year – Perpetual Diversified Income Fund
- Multi-Asset Fund of the Year – Perpetual Balanced Growth Fund

The awards program covers the industry's top performers, including senior professionals, top fund managers, boutique funds, new entrants, as well as the rising stars and leaders of tomorrow.

2024 Zenith Fund Awards

Perpetual was recognised in three categories, winning one:

- Multi-Asset – Real Return *(winner)*
- Sustainable and Responsible Investments – Growth
- Fund Manager of the Year

Held annually, the Zenith Fund Awards aims to recognise the best in funds management across 24 categories and help raise the standard of funds management for the benefit of investors.

2024 Australian Alternative Investment Awards

The team was recognised in two categories, winning one:

- Best Market Neutral Fund – Perpetual Pure Equity Alpha Fund *(winner)*
- Best Alternative Fixed Income & Credit Fund – Perpetual Pure Credit Alpha Fund

The annual awards, held in conjunction with the Hedge Funds Rock charity night, presents an opportunity for alternative managers to celebrate their wins and give back to the community through the Alternative Future Foundation's (AFF) charity partners. Finalists and winners are decided based on a combination of quantitative and qualitative factors agreed by a panel of judges.

2023 and earlier

2023 Zenith Fund Awards

Perpetual was nominated for and won in several categories at the Zenith Fund Awards, including:

- Fund Manager of the Year *(winner)*
- Australian equities – alternative strategies *(winner)*
- Multi asset – real return *(winner)*
- Alternative strategies
- Global and diversified fixed interest

The Zenith awards take into account factors such as organisational and investment team strength, investment philosophy, portfolio construction, risk management and fees.

“There’s no short-termism determining any award – the winning fund managers have to demonstrate they have what it takes to deliver for investors over the long term,” Zenith says.

2022 Lonsec Fund of the Year Awards

The team was nominated for and won in two categories, including the top gong:

- Lonsec Fund Manager of the Year *(winner)*
- Lonsec Multi-Asset Fund of the Year *(winner)*

Having run for more than two decades, the Lonsec Fund of the Year Awards recognise the best-performing managed funds and superannuation products.

This information has been prepared by Perpetual Investment Management Limited (PIML) ABN 18 000 866 535, AFSL 234426. It is general information only and is not intended to provide you with financial advice or take into account your objectives, financial situation or needs. You should consider, with a financial adviser, whether the information is suitable for your circumstances. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information.

The information is believed to be accurate at the time of compilation and is provided in good faith. This document may contain information contributed by third parties. PIML does not warrant the accuracy or completeness of any information contributed by a third party. Forward looking statements and forecasts based on information available at the time of writing and may change without notice. No assurance is given that the forecast will prove to be accurate, as future events may impact actual results and these could differ materially from those anticipated. Any views expressed in this document are opinions of the author at the time of writing and do not constitute a recommendation to act.

The Product Disclosure Statement (PDS) for the relevant funds, issued by PIML, should be considered before deciding whether to acquire or hold units in the Fund. The PDS and Target Market Determination can be obtained by calling 1800 022 033 or visiting our website www.perpetual.com.au.

No company in the Perpetual Group (Perpetual Limited ABN 86 000 431 827 and its subsidiaries) guarantees the performance of any fund or the return of an investor's capital. No allowance has been made for taxation and returns may differ due to different tax treatments. Past performance is not indicative of future performance.

This information has been prepared by Perpetual Investment Management Limited (PIML) ABN 18 000 866 535, AFSL 234426 as the responsible entity of the Perpetual ESG Australian Share Fund (Managed Fund) (ASX: GIVE) (referred to below as “active ETF”). It is general information only and is not intended to provide you with financial advice or take into account your objectives, financial situation or needs. You should consider, with a

financial adviser, whether the information is suitable for your circumstances. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information.

--

The product disclosure statement (PDS) for the Active ETF should be considered before deciding whether to acquire or hold units. The applicable PDSs and Target Market Determinations can be obtained by calling 1800 022 033 or visiting our website www.perpetual.com.au. No company in the Perpetual Group (Perpetual Limited ABN 86 000 431 827 and its subsidiaries) guarantees the performance of any fund or the return of an investor's capital.

--

For important information regarding Lonsec awards and ratings visit: https://www.lonsec.com.au/logo-disclosure/

© 2025 Morningstar, Inc. All rights reserved. The information contained herein: (1) is proprietary to Morningstar and/or its affiliates or content providers; (2) may not be copied, adapted or distributed; (3) is not warranted to be accurate, complete or timely and 4) has been prepared for clients of Morningstar Australasia Pty Ltd (ABN: 95 090 665 544, AFSL: 240892), subsidiary of Morningstar. Neither Morningstar nor its content providers are responsible for any damages arising from the use and distribution of this information. Past performance is no guarantee of future results. Any general advice has been provided without reference to your financial objectives, situation or needs. For more information refer to our Financial Services Guide at www.morningstar.com.au/s/fsg.pdf. You should consider the advice in light of these matters and if applicable, the relevant Product Disclosure Statement before making any decision to invest. Morningstar's publications, ratings and products should be viewed as an additional investment resource, not as your sole source of information. Morningstar's full research reports are the source of any Morningstar Ratings and are available from Morningstar or your adviser. To obtain advice tailored to your situation, contact a financial adviser. Some material is copyright and published under license from ASX Operations Pty Ltd ACN 004 523 782.

Zenith Investment Partners Pty Ltd ABN 27 103 132 672 AFSL 226872 Fund Awards issued 13 October 2023 and 18 October 2024 are solely statements of opinion and not a recommendation in relation to making any investment decisions. Fund Awards are current for 12 months and subject to change at any time. Fund Awards for previous years are for historical purposes only. Full details on Zenith Fund Awards at https://www.zenithpartners.com.au/zenith-fund-awards-2024/