Perpetual to acquire Trillium, a leading specialist ESG investment firm in the U.S.

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By Perpetual
31 January 2020



The acquisition establishes a US footprint for Perpetual and increases exposure to the fast growth ESG sector. Perpetual will leverage its existing distribution capabilities in Australia while building a US-based distribution team to accelerate the growth of Trillium's specialist ESG and impact investment products.

Trillium has one of the longest track records globally within responsible investing, incorporating environmental, social and governance (ESG) factors into its investment approach since its foundation in 1982. It has a variety of ESG focused US, global and thematic equity and US fixed income offerings, including fossil fuel free strategies operating in excess of 20 years. Its funds have a strong investment performance record, with positive net FUM flows and significant capacity for growth across all strategies. The business will continue to operate under the Trillium brand, with the current management team aligned to deliver business growth and no changes to its investment teams or investment process.

The transaction is consistent with Perpetual’s strategic intention to grow via additional investment capabilities across asset classes, investment strategies, geographies and client groups.

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