

Announcement



Tuesday, 19 December 2017

Lifeplan Education Bond

Closure of the AMP Capital Sustainable Share Fund investment option to new investors

Effective immediately the AMP Capital Sustainable Share Fund investment option will be closed to new investors. Existing investors may continue to make additional investments including regular savings plans.

Changes to AMP Capital Sustainable Share Fund investment option

Effective 10 November 2017 the AMP Capital Sustainable Share Fund investment option changed its investment objective, investment approach and fees as follows:

Investment objective

Aims to provide a total return (income and capital growth), after costs and before tax, above the Fund's performance benchmark S&P/ASX 200 Accumulation Index on a rolling 5 year basis.

Investment strategy

The Fund will systematically implement the ESG views of the AMP ESG Research team, avoid companies that fail to meet sustainability criteria and focus on strong performing ESG companies. The Fund will seek to achieve a carbon footprint of at least 30% lower than its benchmark. The manager will engage with companies to further improve the ESG performance of these companies.

Systematic investing is a rules-based approach where no individual stock fundamental analysis is conducted and the investment team use large sets of data to analyse stocks through intelligent screening methods.

Management fee

The fee has been reduced to 0.70% to reflect the change in the investment approach.

For more information

Please refer to the Australian Unity website for up to date information about the Lifeplan Education Bond. If you have any questions, please contact the Investor Services team on 1300 1300 38 or email enquiries@australianunity.com.au, or the Adviser Services team on 1300 133 285 or email investmentbonds@australianunity.com.au.

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