

Hyperion Asset Management

Media fact sheet

Our history

Hyperion Asset Management was founded in 1996 with the aim to grow the wealth of high net worth individuals and enhance their family's futures. Hyperion now manages approximately \$11 billion for industry and public funds as well as many private investors. The moneys are invested in Australian and/or global equities either through large individual mandates or our three publicly available managed funds.

Our approach

We invest like business owners, taking a bottom-up approach that aims to produce superior investment returns for our investors over long-time horizons. Our portfolios are comprised of Australian and global companies with solid fundamentals and structural growth opportunities, and only hold stocks we truly believe in.

Our distinctive approach is not a style of investing for those who want to follow an index or dilute returns through diversification. It's by remaining committed to this philosophy that we've weathered some of the most challenging equities markets in history while having delivered exceptional results to our clients.

Our funds and ratings

Hyperion Global Growth Companies Fund (Managed Fund) invests in our selection of typically 15-30 high-quality growth companies in the US, Europe, Asia and Australia and is open to all investors.

- Lonsec – Highly Recommended*
- Zenith – Highly Recommended**
- Morningstar – Bronze***

The Hyperion Global Growth Companies Fund – Class B changed its name to Hyperion Global Growth Companies Fund (Managed Fund) on 5 February 2021 to facilitate quotation of the fund on the ASX.

Hyperion Australian Growth Companies Fund invests in our selection of typically 15-30 of the top 300 listed Australian companies and is open to current Hyperion investors.

- Lonsec – Highly Recommended*
- Zenith – Recommended**
- Morningstar – Silver***

Hyperion Small Growth Companies Fund invests in our selection of typically 15-30 of the best Australian small cap equity investment opportunities and is open to current Hyperion investors

- Lonsec – Highly Recommended*
- Zenith – Recommended**
- Morningstar – Gold ***

Our most recent awards

Australian Large Cap Equities 2021 - Winner

Money Management's Fund Manager of the Year Awards 2021
Hyperion Australian Growth Companies Fund

Australian Small/Mid Cap Equities 2021 - Winner

Money Management's Fund Manager of the Year Awards 2021
Hyperion Small Growth Companies Fund

2021 Fund Manager of the Year - Winner

Money Management's Fund Manager of the Year Awards 2021

Australian Fund Manager of the Year - Winner

Morningstar Awards 2021

Australian Domestic Equities – Large Caps Category Winner

Morningstar Awards 2021
Hyperion Australian Growth Companies Fund

Australian Domestic Equities – Small Caps Category Winner

Morningstar Awards 2021
Hyperion Small Growth Companies Fund

Best Australian Share Fund - Winner

Money Magazine Best of the Best Awards 2021
Hyperion Australian Growth Companies Fund

Fund Manager of the Year, Domestic Equities – Large Caps Winner

Morningstar Awards 2020

Best Australian based Global Equity Manager - Winner

The Australian Fund Manager Foundation 2018
Hyperion Global Growth Companies Fund (Managed Fund)

Australian Domestic Equities – Large Caps Category Winner

Morningstar Awards 2016
Hyperion Australian Growth Companies Fund

Australian Domestic Equities – Small Caps Category Winner

Morningstar Awards 2016
Hyperion Australian Growth Companies Fund

Our spokespeople

Mark Arnold
Lead Portfolio Manager,
Chief Investment Officer &
Managing Director
CFA, B.Com, LLB, CA, SF Fin



Mark has been a substantial contributor to the investment returns Hyperion has achieved since its inception in 1996. He is an original member of the Hyperion investment team and a founding shareholder. He was the key architect of Hyperion's proprietary investment process including its portfolio management system that has underpinned the investment returns Hyperion has achieved since its establishment in the 1990s. He was instrumental in establishing the organisational culture, values and beliefs that have underpinned Hyperion's long-term success.

Mark is the Chief Investment Officer and Managing Director of Hyperion. He is the most senior and experienced Portfolio Manager in the investment team and has the most influence over Hyperion's investment decision making. Mark is Lead Portfolio Manager across all of Hyperion's equity strategies. He is also the Chair of Hyperion's Investment Committee.

Mark has been professionally analysing listed companies since 1991. He originally worked as a research analyst at Stockbroker Lance Jones Limited and then at Wilsons. Wilsons helped facilitate the establishment of Hyperion.

Mark is a qualified chartered accountant. Prior to establishing himself in the investment industry, Mark worked for KPMG. He holds undergraduate qualifications in Commerce and Law. Mark is a CFA Charterholder and is the largest executive shareholder in Hyperion.

Jason Orthman
Lead Portfolio Manager,
Deputy Chief Investment Officer
& Executive Director
CFA, B.Eng (Chemical), B.Bus



Jason was promoted to Deputy Chief Officer in 2017 in recognition of his contribution to Hyperion's alpha and strong communication skills within the broader team. Jason is also an Executive Board member of Hyperion Asset Management and serves as Deputy Chair of the Hyperion Investment and Executive Committees. Jason is responsible for setting and improving the investment framework and process with the CIO.

He continues to serve as Lead Portfolio Manager across all of its three equity strategies (Australian Equities, Small Cap and Global Equities). The two Lead Portfolio Managers have the vast majority of the influence in setting stock weights and are responsible for what stocks enter and exit the portfolios.

Jason joined Hyperion in 2008 as an Investment Analyst and was promoted to Portfolio Manager in 2009. Jason continues to be responsible for the research of equities in support of the team's investment decisions across Hyperion's product range. Jason gained 6 years industry experience as a Senior Research Analyst with a stockbroker, Wilsons, prior to joining Hyperion. Wilsons helped facilitate the establishment of Hyperion. He joined Wilsons in 2002 and spent most of his time at the firm in Research as a small to mid-cap Equity Analyst. He has covered a wide range of sectors including mining services, retail, manufacturing and waste.

Jason has a Bachelor of Chemical Engineering (1st Class Honours) and a Bachelor of Business Management from the University of Queensland. He also completed a Graduate Diploma of Applied Finance and Investment from the Australian professional body (now called FINSIA). Jason is a CFA Charterholder and significant shareholder of Hyperion.

"Investing is an intellectual challenge that includes unpacking different companies, business models and trends. It's a thrill to find new opportunities that create value over time."

If you would like to arrange an interview with Hyperion's spokespeople, please get in touch with:

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Disclaimers and disclosures

Interests in the Hyperion Australian Growth Companies Fund (ARSN 089 548 443), Hyperion Global Growth Companies Fund (Managed Fund) (ARSN 611 084 229) and Hyperion Small Growth Companies Fund (ARSN 089 548 943) ('the Funds') are issued by Pinnacle Fund Services Limited ABN 29 082 494 362, AFSL 238371. Pinnacle Fund Services Limited is not licensed to provide financial product advice. Hyperion Asset Management Limited ('Hyperion') ABN 80 080 135 897, AFSL 238 380 is the investment manager of the Funds. Please read the Product Disclosure Statement ('PDS') in its entirety before making an investment decision in the Funds. You can obtain a copy of the latest PDS of the Funds by contacting Hyperion at 1300 497 374 or via email to investorservices@hyperion.com.au. The Hyperion Small Growth Companies Fund is currently closed to new applications.

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*The Lonsec Ratings (assigned as follows: Hyperion Australian Growth Companies Fund – July 2020; Hyperion Small Growth Companies Fund – July 2020, Hyperion Global Growth Companies Fund - Class B - February 2020) presented in this document are published by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421445. The Ratings are limited to "General Advice" (as defined in the Corporations Act 2001 (Cth)) and based solely on consideration of the investment merits of the financial products. Past performance information is for illustrative purposes only and is not indicative of future performance. They are not a recommendation to purchase, sell or hold Hyperion Asset Management products, and you should seek independent financial advice before investing in these products. The Ratings are subject to change without notice and Lonsec assumes no obligation to update the relevant documents following publication. Lonsec receives a fee from the Fund Manager for researching the products using comprehensive and objective criteria.

For further information regarding Lonsec's Ratings methodology, please refer to our website at: <https://www.lonsec.com.au/investment-product-ratings/>

**The Zenith Investment Partners ("Zenith") ABN 60 322 047 314 rating (Hyperion Global Growth Companies Fund (Class B) November 2020, Hyperion Australian Growth Companies Fund June 2020, Hyperion Small Growth Companies Fund February 2020) referred to in this document is limited to "General Advice" (as defined by the Corporations Act 2001) for wholesale clients only. This advice has been prepared without taking into account the objectives, financial situation or needs of any individual. It is not a specific recommendation to purchase, sell or hold the relevant product(s). Investors should seek independent financial advice before making an investment decision and should consider the appropriateness of this advice in light of their own objectives, financial situation and needs. Investors should obtain a copy of, and consider the PDS or offer document before making any decision and refer to the full Zenith Product Assessment available on the Zenith website. Zenith usually charges the product issuer, fund manager or a related party to conduct Product Assessments. Full details regarding Zenith's methodology, ratings definitions and regulatory compliance are available on our Product Assessment's and at <https://www.zenithpartners.com.au/regulatory-guidelines-funds-research>. Past performance is for illustrative purposes only and is not indicative of future performance.

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The Morningstar Rating is an assessment of a fund's past performance - based on both return and risk - which shows how similar investments compare with their competitors. A high rating alone is insufficient basis for an investment decision.

The Morningstar Analyst Rating [™] for Hyperion Global Growth Companies Fund (Class B) is Bronze as of 08/04/2021, Hyperion Australian Growth Companies Fund is Silver as of 30/09/2020 and Hyperion Small Growth Companies Fund is Gold as of 28/09/2020.

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Morningstar Awards 2020©. Morningstar, Inc. All Rights Reserved. Awarded to Hyperion Asset Management for Winner, Domestic Equities Large Cap, Australia. Hyperion Asset Management nominated for Finalist, Domestic Equities Small Cap category and Overall Fund Manager of the Year, Australia.

Morningstar Awards 2016 (c). Morningstar, Inc. All Rights Reserved. Hyperion Asset Management has been Awarded the Overall Fund Manager of the Year in Australia. Awarded Domestic Equities – Large Caps Category Winner and Domestic Equities – Small Caps Category Winner, Australia.