

Hyperion Asset Management

Media fact sheet

Our history

Hyperion Asset Management was founded in 1996 to grow the wealth of high net worth individuals and secure their family's futures. Hyperion now manages approximately \$6 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 Australia 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 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 – Recommended**

Hyperion Australian Growth Companies Fund invests in our selection of typically 15-30 of the top 200 listed Australian companies and is open to current Hyperion investors.

- Lonsec – 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.

- Zenith – Recommended**
- Morningstar – Silver****

Our most recent awards

Best Australian based Global Equity Manager

The Australian Fund Manager Foundation 2018
Hyperion Global Growth Companies 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

2013 Fund Manager of the Year

Money Management | Lonsec – Winner: Australian Equities (Broad Cap)

2013 Fund Manager of the Year

Money Management | Lonsec – Winner: Australian Equities (Small Cap)

Our spokespeople

Mark Arnold
Chief Investment Officer
CFA, B.Com, LLB, CA, SF Fin

Mark has been a key contributor to the investment returns Hyperion has achieved since its inception in 1996. He has played an integral role in the design of Hyperion's investment process and was instrumental in establishing the collegiate investment team culture that has underpinned Hyperion's long-term success. Mark is an executive director on the Hyperion Board and is Chair of the Executive Committee.



Mark is the most senior Portfolio Manager in the investment team. He has portfolio management responsibilities 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 was the creator and original 100% equity owner 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 a substantial shareholder in Hyperion.

Jason Orthman
Deputy Chief Investment Officer
CFA, B.Eng (Chemical), B.Bus



Jason is the Deputy Chief Investment Officer and Deputy Chair of the Executive Committee at Hyperion. He is responsible for the research of equities in support of the team's investment decisions across Hyperion's product range.

Jason believes that quality structural growth companies will outperform average businesses over the long term, when purchased at appropriate prices. He is also committed to Hyperion's investment led equity ownership model. Jason will continue to promote quality research and analysis as core to Hyperion's alpha driven success.

Jason has a Bachelor of Chemical Engineering (1st Class Honours), a Bachelor of Business Management, a Graduate Diploma of Applied Finance and Investment, and is a CFA charterholder.

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

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Ratings Disclaimers

* The Lonsec Ratings (assigned as follows: Hyperion Global Growth Companies Fund – February 2019; Hyperion Australian Growth Companies Fund – August 2017; Hyperion Small Growth Companies Fund – February 2017) 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

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**The Zenith Investment Partners ("Zenith") ABN 60 322 047 314 rating (HGGCF November 2017, HAGCF June 2017, HSGCF February 2017) 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 <http://www.zenithpartners.com.au/RegulatoryGuidelines>

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