



Frequently asked questions

For adviser use only

November 2020



Question

Answer

What has changed?

Since 1989, we have managed funds under the Colonial First State brand. Following the sale of our business, the names of these funds are changing to reflect our new name, First Sentier Investors. There are also changes to products managed by our individually branded investment teams.

View the list of products affected by brand name changes at www.firstsentierinvestors.com.au/productchanges

Why have the fund names changed?

Colonial First State Global Asset Management changed its name to First Sentier Investors in September 2019, following the change of ownership from the Commonwealth Bank of Australia to Mitsubishi UFJ Trust and Banking Corporation, a wholly-owned subsidiary of Mitsubishi UFJ Financial Group, Inc. (MUFG).

Funds managed by First Sentier Investors now reflect the name of the global investment manager and its sub brands.

What is the relationship between First Sentier Investors, Realindex Investment, FSSA Investment Managers and Stewart Investors?

First Sentier Investors is a stand-alone asset management business and the home of investment teams FSSA Investment Managers, Realindex Investments and Stewart Investors. While the teams work with discrete investment autonomy, according to their own investment strategies and philosophies, the investment teams are united in a common commitment to responsible investment principles.

Will there be changes to funds managed by FSSA Investment Managers, Stewart Investors and Realindex Investments?

Some funds that use the Colonial First State brand are managed by FSSA Investment Managers, and will change name to reflect the FSSA Investment Managers name.

There will be further changes to the names of some funds managed by Stewart Investors.

There are no changes to funds managed by Realindex Investments.

View the list of products affected by name changes at www.firstsentierinvestors.com.au/productchanges

Is anything else changing?

There is no change to investment teams or management of funds related to the change of fund names.

The latest fund information can be found in the product disclosure statement.

Will CFS funds managed by First Sentier Investors be available on the same platforms?

Existing funds will continue to be available on all existing platforms.

Why did First Sentier Investors choose the name First Sentier Investors?

When choosing a brand name, there were a number of considerations.

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- We wanted a brand name that reflected core attributes of our personality and business philosophy
- We wanted a brand name that had a link to our past so we could retain some of our heritage
- We wanted a brand name that provided a smooth transition from First State Investments, the brand used by our business outside of Australia
- We needed a brand name that was available for trademark in all jurisdictions in which we operate
- We are required to transition to get-up / livery / logo design that is not similar to previous designs

The name First Sentier Investors met all the above criteria.

“**Sentier**” means path or pathway. It’s a French word, although we are pronouncing without a French accent.

We did not set out to choose a French word, or a word of any particular language, but we did set out to find a word on which we could build a differentiated brand story. The idea of walking untrodden paths, having our own perspective and seeing further ahead was very aligned to our business philosophy and the brand personality staff helped us develop.

By choosing a slightly less known word, we can trademark it in all jurisdictions and create our own meaning over time.

Finally, we chose “**Investors**” ahead of Investment Management or Asset Management as we wanted an active and more widely understood word.

First Sentier Investors also abbreviates to FSI which provides a smooth transition for those markets who currently use this abbreviation.

Where can I find information and resources about the new brand?

Visit <https://www.firstsentierinvestors.com.au> to view videos and content that highlights the new brand and our brand proposition.

Why did the brand name change and the product name change happen over 12 months apart?

We transitioned fund names to align with the new brand as part of scheduled PDS updates.

Is there an ongoing relationship between First Sentier Investors and CFS?

First Sentier Investor is the appointed investment manager of a number of CFS funds. Both companies were previously owned by the Commonwealth Bank of Australia. Colonial First State remains as a platform provider and an important client of First Sentier Investors.

Is there a full list of brands and funds?

You can view the full list of funds and name changes at www.firstsentierinvestors.com.au/productchanges

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How can I communicate this change to my clients?

We have created an adviser resource centre at www.firstsentierinvestors.com.au/productchanges that provides further information about First Sentier Investors, a letter you can share with your clients detailing the changes and a list of funds that will be changing names.

How can I contact a BDM about these changes?

If you are an adviser, you can contact your First Sentier Investors key account manager directly about funds managed by First Sentier Investors, Realindex Investments, Stewart Investors and FSSA Investment Managers. Their contact details can be found [here](#).

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On 16 September 2019, Colonial First State Global Asset Management (CFSGAM) rebranded to First Sentier Investors. Any content produced prior to this date may be branded CFSGAM and include trade marks that First Sentier Investors is permitted to use under licence.

The product disclosure statement (PDS) and Information Memorandum (IM) for the Colonial First State Global Listed Infrastructure Securities Fund-Class A, ARSN 157 876 134 (Fund) issued by Colonial First State Investments Limited (ABN 98 002 348 352, AFSL 232468) (CFSIL) should be considered before making an investment decision. The PDS or IM are available from First Sentier Investors on its website.

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