

## INVESTORS MUTUAL RETURNS BRING IN HIGH CROWN RATING

30 November 2017 By [Hope William-Smith](#)



**Money Management's new Crown Ratings powered by FE confirm Investors Mutual as one of the most solid performers over the past three years, with five of its funds receiving a full five-star rating.**

Five Investors Mutual funds were deemed worthy of five Crowns under *Money Management's* new ratings scheme -- **a quantitative measure of funds which** enables investors to distinguish between those that are strongly outperforming their benchmark and those that are not.

The [Australian Small Companies Fund](#), [Concentrated Australian Share Fund](#), [Equity Income Fund](#), [Future Leaders Fund](#), and the [Small Caps Fund](#) all received five Crown Ratings, which placed the fund manager firmly alongside high performers Perpetual Investment Management, Morningstar Investment Management, IOOF Investments, Fiducian and Macquarie Investment Management.

Speaking to *Money Management*, Investors Mutual senior portfolio manager and Australian Small Companies Fund, Future Leaders Fund and Small Caps Fund manager, Simon Co the firms' fund strategy, performance and investment philosophy were both disciplined and focused.

"We seek to invest in companies with a competitive advantage, recurring and predictable earnings, run by capable management, with long term growing earnings and that are traded at reasonable prices. This disciplined and focused approach has been key to IML (Investors Mutual) delivering consistent investment returns for our investors," he said.

"Further...we believe it is essential for investors to remain focussed on the long term and not to get caught up the latest market fad – which is crucial especially at market extremes like the tech boom of 2000, the chase of highly leveraged stocks pre-GFC (Global Financial Crisis) or the current mini resource boom."

Conn confirmed Investors Mutual funds had enjoyed a good track record with regards to performance consistency over different market cycles, with less volatility than both the index and its peers.

"In this subdued economic environment, and where 60-70 per cent of the ASX300 is concentrated in resources and financials, IML's small and mid-cap strategies offer a wide range of sectors, and broaden the opportunity to find quality companies which are often overlooked or under researched," he said.

"[Our] small and mid-cap funds seek to provide investors a diversified portfolio of quality undervalued companies and aim to generate sustainable long-term returns via a combination of long term capital growth and income."



Source: FE Analytics

According to FE Analytics, Investors Mutual

Concentrated Australian Share Fund had a three-year annualised first-quartile ranked return of 10.23 per cent, ahead of the 6.62 per cent, fourth-quartile ranked benchmark.