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FY2022 Results Q&A Webinar

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Lead Portfolio Manager

Nick Healy
Portfolio Manager

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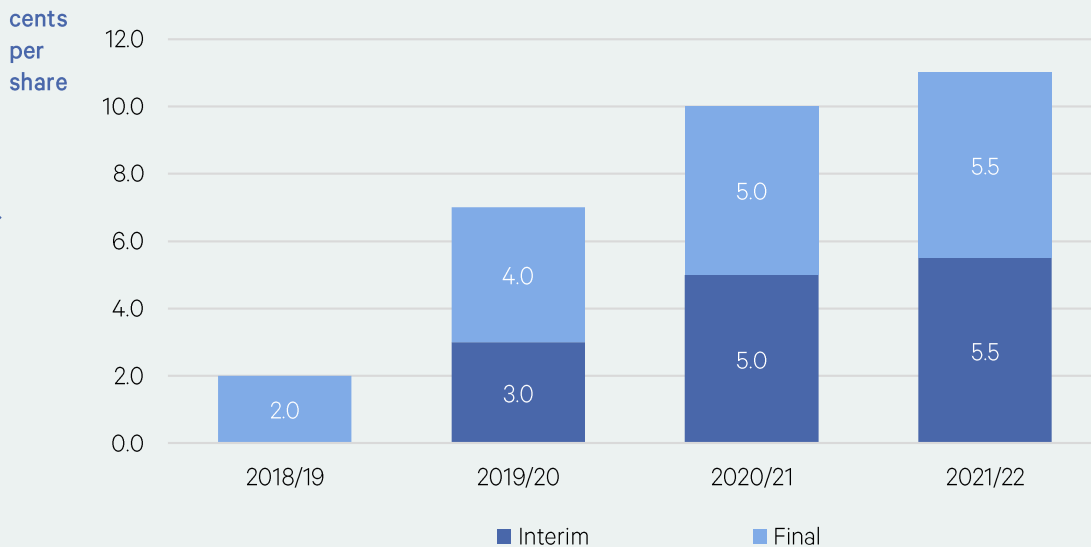
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Increased fully franked dividends

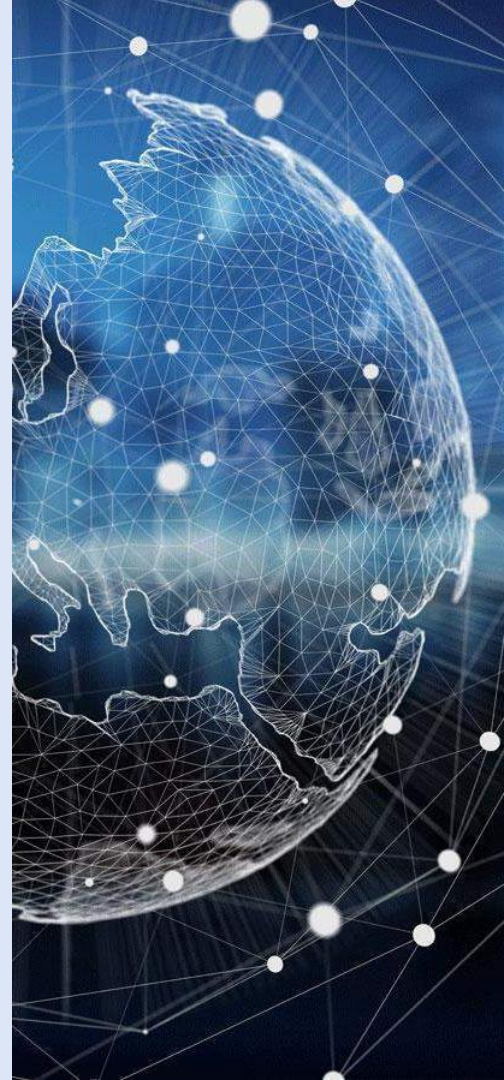
11.0 cents per share
FY2022 fully
franked full year
dividend

10.0% increase in fully
franked full year
dividend



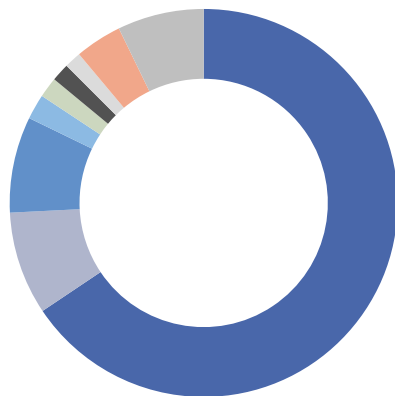
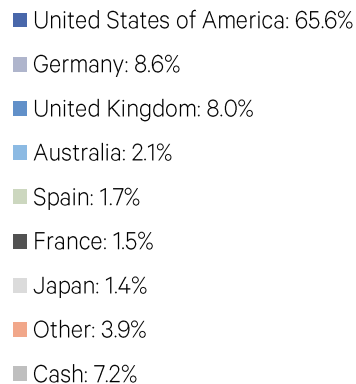
Global markets update

Catriona Burns
Lead Portfolio Manager

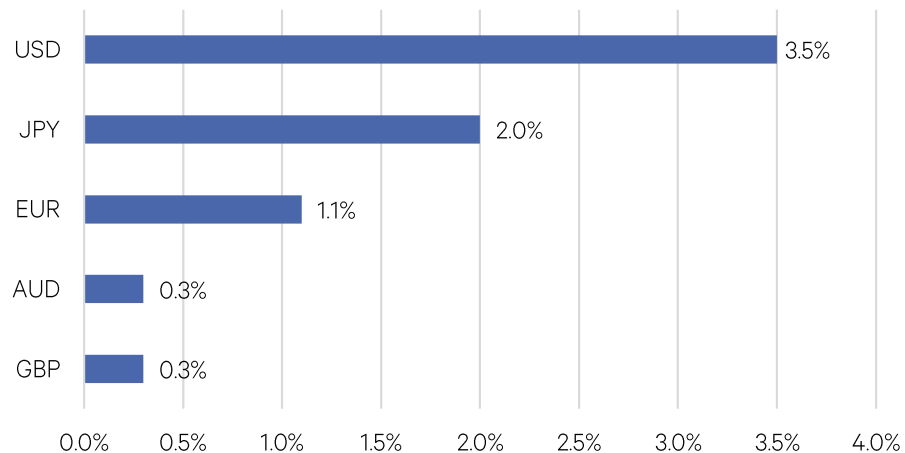


Portfolio composition

Portfolio by geographic exposure

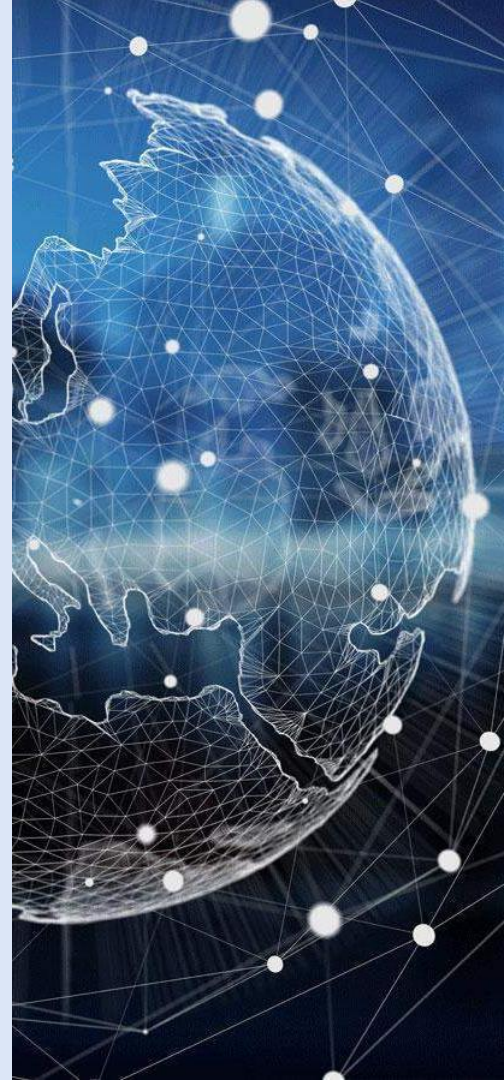


Cash currency exposure
















Thematics

Nick Healy
Portfolio Manager



WAM Global top 20 holdings (in alphabetical order)

 Gallagher AJG US	 Applus+ APPS SM	 Avantor AVTR US	 AMERICAN EXPRESS AXP US	Booz Allen Hamilton® BAH US
 BOOKING HOLDINGS BKNG US	 CONCENTRIX™ CNXC US	 DEUTSCHE BÖRSE GROUP DB1 GY	 dun & bradstreet DNB US	FERGUSON FERG LN
 fiserv. FISV US	 HCA Healthcare® HCA US	 ICE ICE US	 ICON ICLR US	 LOWE'S LOW US
 QUANTA SERVICES, INC. PWR US	 ThermoFisher SCIENTIFIC TMO US	 TransUnion. TRU US	VISA V US	 ZEBRA ZBRA US

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Investor Q&A



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