



Local Knowledge, Global Expertise

Your goals, our commitment.

Local Knowledge

Amova is a dedicated global investment manager with highly skilled teams in New Zealand and around the world. For decades we have been managing funds successfully for many of New Zealand's well known companies and charitable organisations.

The local knowledge of our Auckland-based investment teams is supported by carefully selected offshore managers for global assets. The combination of local and international investment expertise helps us to deliver strong returns for our investors.

Our parent company, Amova Asset Management, is one of Asia's largest asset managers. It provides high-conviction, active fund management across a range of Equity, Fixed Income and Multi-Asset strategies.

Why invest with Amova

1. Client first

- Integrity is at the core of what we do. We are committed to upholding the highest standards of business ethics and conduct.

2. Institutional calibre

- Best of breed, institutional-calibre investment management. We have been trusted to manage the assets of some of NZ's largest organisations.

3. Unrivalled Global connectivity

- Being a part of a specialist global investment manager provides Amova NZ the advantage of partnering local knowledge and experience with significant global resources.

4. Long established in New Zealand

- You're investing directly with the investment experts that financial professionals and some of New Zealand's largest organisations have trusted to manage their money for decades.

5. Multi-Award Winning

- Morningstar Fund Manager of the Year 2025 - Fixed Interest. Fund Manager of the Year Finalist in 2020, 2021, 2022, and 2023.
- Canstar Outstanding Value Star Rating 2024 - Defensive KiwiSaver Profile.

6. Innovation-led and committed to progressive solutions

- GoalsGetter is a modern, easy to use platform for investors looking to access Amova funds and KiwiSaver funds across NZ's leading fund managers.

Environmental, Social + Governance

We want the organisations we invest in to run their businesses for the benefit of all stakeholders in their ecosystem. This means that staff, clients, suppliers, shareholders and others are appropriately cared for, and due respect is given to environmental, societal and relevant operating considerations.

We ask the same of ourselves.

We are long term investors and believe that organisations who operate with Sustainability at the forefront will produce the best outcomes over the longer term, therefore applying our principles will both mitigate risks in the portfolio and enhance expected returns.

Commitment To ESG

- Signatory to UN-supported Principles for Responsible Investment since 2007
- A+ rating in PRI Assessment Report for Strategy & Governance and in-house listed equity / fixed income*
- Signatory of the Aotearoa New Zealand Stewardship committing to responsible investment stewardship in Aotearoa.

Corporate Profile

- Established in 1959, now one of Asia's largest asset managers
- Over 850 employees worldwide with a team of 36 in New Zealand
- Global resources across 13 countries/regions.

With a selection of Amova investment funds alongside the GoalsGetter KiwiSaver Scheme, which offers funds from NZ's leading fund managers, investors have the ability to build personalised and diversified investment portfolios in a simple and cost-effective manner.

Contact Details

Please contact us if you have any questions

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0800 303 308

amova-am.com

* Applies to Amova Asset Management Co., Ltd. (Japan-based entity).

** The Investor Agenda has been developed by seven partner organisations, including PRI and CDP, to aggregate climate change initiatives within the global investor community. Includes Climate Action 100+ and the Taskforce for Climate-Related Financial Disclosure.

Overview

Global Expertise

Progressive Solutions

Japan's **1st** SRI fund



Performance

224 highly experienced investment professionals



Global Citizen with Asian DNA

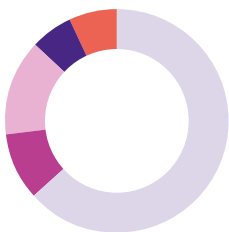
Represented by around **25** nationalities



Our Global Capabilities

Qualitative insight through a broad range of global investment capabilities.

Total Assets Under Management (USD \$260.3bn*)



AUM
\$260.3^{bn}

Total Equity	71.3%
Total Fixed Income	7.1%
Cash Equivalent	11.7%
Balanced	4.5%
Alternative / Others	5.2%

Our Investment Funds

Impact

Amova Freedom Fund

Growth

Amova Core Equity Fund
Amova SRI Equity Fund
Amova Concentrated Equity Fund
Amova Global Shares Fund
Amova Global Shares Hedged Fund
Amova Global Equity Multi-Manager Unhedged Fund
Amova Global Equity Multi-Manager Hedged Fund
Amova ARK Disruptive Innovation Fund

Fixed Income

Amova NZ Cash Fund
Amova NZ Bond Fund
Amova NZ Corporate Bond Fund
Amova Global Bond Fund

Diversified

Amova Conservative Fund
Amova Balanced Fund
Amova Growth Fund

Our funds are available via platforms including GoalsGetter, Consilium, FNZ, One Answer, Adminis, Apex as well as through financial advisers.



Fund Manager of the Year - Fixed Interest
Amova Asset Management New Zealand Limited



Outstanding Value Star Rating - Defensive KiwiSaver Profile
GoalsGetter KiwiSaver Scheme Amova NZ Cash Fund

* As at 30 June 2025. Including overseas subsidiaries, affiliates and minority joint ventures. May not add up to Total AUM due to rounding. Consolidated assets under management and advice of Amova, including subsidiaries but excluding minority affiliates and minority joint ventures.

GoalsGetter KiwiSaver Scheme Funds

Aggressive

Amova High Growth Fund
Generate Focused Growth Fund
Milford Aggressive Fund

Growth

Amova Growth Fund
Harbour Active Growth Fund
Milford Active Growth Fund
Pathfinder Ethical Growth Fund
Salt Capital Growth Fund

Balanced

Amova Balanced Fund
Generate Balanced Fund
Harbour Sustainable Impact Fund
Milford Balanced Fund

Conservative

Amova Conservative Fund
Milford Conservative Fund

Other

Amova NZ Cash Fund
Amova NZ Corporate Bond Fund
Amova SRI Equity Fund
Amova Global Shares Fund
Amova ARK Disruptive Innovation Fund
Generate Thematic Fund

Benefits To You

Diversification : Combine high-quality handpicked funds from NZ's leading fund managers for your KiwiSaver portfolio

Easy-to-use : Fully digital, transparent and intuitive interface

Low-Cost : No platform fees

Accessible : Transfer your KiwiSaver investment online in minutes

Connected : Track balances, transactions, performance and holdings information online anytime

Support : Dedicated customer support team to answer questions along your investment journey

Informative : Receive regular market and fund insights from our team of investment professionals

"We've created the GoalsGetter KiwiSaver Scheme to provide our clients with the ability to build diversified portfolios using high quality, handpicked funds. Now investors can create tailored KiwiSaver portfolios with confidence, on our easy-to-use online platform."

Stuart Williams | Managing Director, Amova NZ

