



Publication Guidelines

Guidelines for use of Lonsec logos and ratings

Requirements and Disclaimers for use and publishing of Lonsec
Research Ratings, Reports, Logos, IP and Awards

March 2025

Please ensure that this document is made available to marketing and other departments responsible for digital media publication, client communications and promotional activities.

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1. Introduction

1.1 Congratulations

Congratulations on receiving your Lonsec Rating, Logo and/or Award! We encourage all recipients to promote their achievements by displaying their Rating, Logo and/or Award prominently on their website, marketing material, media releases, digital communications, and other collateral.

These requirements help you get the most out of your Rating, Logo or Award while adhering to Lonsec's publication and intellectual property (i.e. Lonsec name, logo and any other Lonsec trademark) (**Lonsec IP**) requirements.

Please ensure that this document is made available to marketing and other departments responsible for digital media publication, client communications and promotional activities.

1.2 Requesting Approval

You are required to submit a final version of all promotional or marketing material in any form that refers to or includes a Lonsec Rating, Logo, Award and/or any Lonsec IP to ensure that it complies with Lonsec's legal obligations and brand guidelines.

Each fund is responsible for the preparation, creation of, and any costs associated with, promotional material incorporating Lonsec Ratings, Logos, Awards and Lonsec IP. Each fund is responsible for the wording and description of their achievements and may only refer to Lonsec or Lonsec Research with our written approval. Unauthorised use of research reports, Ratings, Logos, Awards, using an incorrect disclaimer, or any other misuse of Lonsec's IP, may lead to immediate and final withdrawal of your Rating, Logo, Award or our consent to use Lonsec IP.

To request approval, or if you have any questions about how best to display and publish your rating, Award or Logos or how you use Lonsec (IP), please contact us by calling 1300 826 395, or via email at: research.publishing@lonsec.com.au.

1.3 Important information

This document is issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421445 (Lonsec Research) a fully owned subsidiary of Lonsec Holdings Pty Ltd ABN: 41 151 235 406 (Lonsec Group). Generation Development Group Limited ABN 90 087 334 370 is the parent company of Lonsec Group.

These standards form part of your agreement(s) with the Lonsec Group and Lonsec Research (as applicable).

2. How to use your Rating, Logo, Award, or other Lonsec IP

We take our brand seriously because we want our recipients to be recognised and acknowledged as high-value providers. To help us maintain the integrity of our IP, please ensure that you adhere to these standards and requirements at all times when displaying or using Lonsec IP, including using the correct image size, colour, resolution, and ensuring adequate space surrounds them.

Recipients that receive a Rating, Logo, or Award from Lonsec can request an image file in a range of formats for use in their own marketing and promotional materials. When selecting an image format, it's important to consider the type of media you're using to ensure the best display and compatibility. Use the guide below and work with your marketing team to get the best results.

Print (high resolution)

We recommend an EPS (Encapsulated PostScript) format. If the image is to be used in any printed format – brochures, posters, advertising, the image needs to be of a high resolution (high image quality). An EPS file is a file that can be scaled to any size without losing any quality.

Web and digital media (low resolution)

We recommend a JPEG (Joint Photographic Experts Group) format. If the image is to be used in any web-based media the image needs to be of a low resolution (low image quality). A JPEG compresses file size by selectively discarding data allowing you to load website images quickly. They are designed to be viewed on screen-based media such as computer monitors, projectors and video. A PNG format can also be used for web display, although generally JPEG is preferred to optimise load time.

Microsoft Office

We recommend a PNG (Portable Network Graphics) format. If the image is to be used in any Microsoft Office applications, e.g. Word and PowerPoint, the image needs to be a PNG format, which is of medium resolution. PNG files are specifically formatted for use in these programs. PNG images produce transparent backgrounds, which allow you to place them on coloured backgrounds.

3. Conditions of Use

Lonsec Research Intellectual Property Type	Conditions of Use
All IP Types	<ol style="list-style-type: none"> 1) Use of Lonsec IP (i.e. Lonsec trademark, name and/or logo) must be in accordance with requirements set out in Item 6.4 below 2) When displaying Lonsec Research Ratings, Logos, or Award images on your website, each image must actively link to the following Lonsec Research site when clicked https://www.lonsec.com.au 3) Unauthorised use of any Lonsec IP, may lead to an immediate and final withdrawal of your ability to use the IP.
Lonsec Research Ratings and Research Reports	<ol style="list-style-type: none"> 1) The Lonsec Research Rating and research reports <u>must be</u> the latest available. Where there has been a change in the rating and/or report, you are obligated to immediately remove the old rating and/or report from any marketing materials (including any websites/social media) and update as applicable. 2) Expired ratings and fund review reports <u>must not</u> be used or accessible via your website or any other channels. 3) Lonsec Research Ratings and research reports will expire after the close of the offer period or 12 months from the date the fund report is issued (unless a review is underway at the time of expiry and then a report remains valid until the new report is published). 4) Copies of research reports may be provided to confirmed holders of an Australian Financial Services License, their representatives or authorised representatives on express request. 5) You can only display the Research Report on your website if access to the Research Report is restricted by one of the following means: <ol style="list-style-type: none"> a) the Research Report is placed in a password-protected section of the website designated for financial advisers; b) an email link is provided for the financial adviser to request a copy of the Research Report, which is not displayed on the website; c) a pop-up dialog box requests the user to confirm their status as a financial adviser; or d) another access method approved by Lonsec in writing. 6) You may include extracts from the associated Lonsec Research report to emphasize the reasons behind the rating. If you refer to the report, please use direct, unedited quotations and indicate that these are quoted from the text of the report using the name and date of the report. 7) You may not paraphrase, generalise comments or opinions, or modify the text in a way that may change the reader's impression or interpretation of the rating. 8) You may use the logo on social media, such as LinkedIn, Twitter etc. The correct disclaimer must be displayed. Additionally, retweeting news articles or other posts must be from the recipient's account, not from personal social media accounts. 9) The relevant disclaimer must accompany all uses of a Lonsec Research Rating or research report extract as set out in Section 4 below. 10) All extracts and references to ratings or reports must always be submitted to

Lonsec Research Intellectual Property Type	Conditions of Use
	Lonsec for prior written approval.
Lonsec Research 5-Year Logos	<ol style="list-style-type: none"> 1) Lonsec Research 5-Year Logos may be displayed and used upon purchase provided they are accompanied by a current Lonsec Research Rating that is “Highly Recommended” or “Recommended” for the same fund. 2) Previous years’ Lonsec Research 5-Year Logos that have been purchased, may be displayed and used provided they are also accompanied by the current 5-Year Logo and a current Lonsec Research Rating of “Highly Recommended” and “Recommended” for that same fund. 3) Where a fund no longer has an active “Highly Recommended” OR “Recommended” Lonsec Research Rating, the fund is no longer able to use the Lonsec Research 5 -Year Logo on any of its material and must remove the logo from any existing material immediately. 4) Promotional material must reference the year for which the Lonsec Research 5-Year Logo applies. 5) You are able to use the Lonsec 5-Year Logo: <ol style="list-style-type: none"> a) on your website, but it must be made clear which fund this logo relates to. b) on printed marketing and/or collateral material specific to the fund. For instance, this would include the fund PDS, fund marketing flyers/brochures etc. Where you have material that covers multiple funds, any purchased Lonsec Research 5-year Logos may be used but it must be made clear to which fund the logo relates. c) on social media, such as LinkedIn, Twitter etc. The correct disclaimer must be displayed. Additionally, retweeting news articles or other posts must be from the recipient’s account, not from personal social media accounts. d) on digital marketing material, but it must be clear to which fund this logo relates. When electronically displaying the logo, each logo must actively link to the Lonsec website when clicked (www.lonsec.com.au). 6) The relevant disclaimer must accompany all uses of the Lonsec Research 5-Year Logo as set out in Section 4 below.
Lonsec Research/Money Management Awards	<ol style="list-style-type: none"> 1) Momentum Media (through Money Management) owns and manages all event logistics including Award distribution, physical trophies on the night, as well as sending the winner seals via email to all winners following the event. Awards categories can change from year to year and are finalised prior to the Fund of the Year Awards. For more information, please refer to Money Management. 2) Awards may be used on an ongoing basis provided they are accompanied by a current Lonsec Research Rating image. 3) Promotional material must refer to the year for which the award applies. If an award has been received in consecutive years, this can also be stated. 4) The relevant disclaimer must accompany all uses of the Lonsec Research / Money Management Awards as provided by Money Management. 5) All award use or references must be submitted to Lonsec for approval.

4. Disclaimers

An appropriate disclaimer must always accompany the use of any Lonsec Research Rating, Logo, Award or any information from a Lonsec research report. The disclaimer you use will depend on the Lonsec IP used, and in the case of a Lonsec Research Rating, whether you choose to include an extract from the Lonsec research report.

General Disclaimer Requirements

1. Disclaimers must be displayed in a minimum size 8 font and clearly associated with the Rating, Logo, Award or research report extract.
2. The text must be reproduced in full without alteration and include the date of publication of the relevant rating.
3. Lonsec disclaimers must not be combined with any other disclaimers.
4. A single disclaimer may be used for more than one fund provided the rating assignment and dates for each fund are clearly displayed. This can be done either by using the APIR codes or the full names of the funds.
5. When promoting Lonsec IP in a digital format, an alternative to publishing the full disclaimer is to add preview text (or hover text) to the image. This will invite users to “Click here for important information about this rating/logo/award” and will hyperlink to the Lonsec website.
6. We acknowledge proximal display of disclaimer or preview text links may not be possible in some mediums for example, digital display advertising such as online banners or email footers.
7. Publication of ratings can still be permitted if the promotion links to a page where the Lonsec rating logo is prominently displayed, and appropriate disclaimer provided in line with these standards.
8. Refer to the table below for information about what disclaimer to use for each type of Lonsec IP.

Lonsec Intellectual Property Type	Disclaimer to be used	Additional Notes
All IP Types Social Media Posts/Digital Platforms Only	<i>Click here for important information about this (rating/logo/award): https://www.lonsec.com.au/logo-disclosure</i>	This disclaimer may be used on social media posts/digital platforms where there is limited space only.

Lonsec Intellectual Property Type	Disclaimer to be used	Additional Notes
Lonsec Research Rating (or Lonsec Research Report extract)	<p><i>The rating published on MM/XXXX for (APIR/ASX/Product name) is issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). Ratings are general advice only and have been prepared without taking account of investors' objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing.</i></p> <p><i>The rating is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and Lonsec Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2025 Lonsec. All rights reserved.</i></p>	<p>For digital media please ensure the text Lonsec Research Pty Ltd contains a hyperlink to www.lonsec.com.au.</p>
More than 1 Lonsec Research Rating	<p><i>The ratings published on MM/XXXX for (APIR/ASX/Product name) and MM/XXXX for (APIR/ASX/Product name) ...are issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research). Ratings are general advice only and have been prepared without taking account of investors' objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing.</i></p> <p><i>The ratings are not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings are subject to change without notice and Lonsec Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2025 Lonsec. All rights reserved.</i></p>	<p>The name of the product or APIR and report date should be repeated as required for each rating image published.</p> <p>For digital media please ensure the text Lonsec Research Pty Ltd contains a hyperlink to www.lonsec.com.au.</p>
Lonsec Research Logo	<p><i>Rating and logo published on MM/XXXX for (APIR/ASX/Product name) are issued by Lonsec Research Pty Ltd ABN 11 151 658 561 AFSL 421 445 (Lonsec Research) for use in Australia only. Ratings and logos are general advice only and have been prepared without taking account of investor objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. The rating and/or logo is not a recommendation to purchase, sell or hold any product. Past performance information is not indicative of future performance. Ratings and logos are subject to change without notice and Lonsec Research assumes no obligation to update. Lonsec Research uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for further information and to access the full report. © 2025 Lonsec Research. All rights reserved.</i></p>	<p>Lonsec Research Logos must be published alongside active Lonsec Research Ratings.</p> <p>For digital media please ensure the text Lonsec Research Pty Ltd contains a hyperlink to www.lonsec.com.au.</p>
Lonsec Research Rating (or Lonsec Research Report extract). Shortened Digital Format Version	<pre></pre>	<p>Example HTML code.</p>

Lonsec Intellectual Property Type	Disclaimer to be used	Additional Notes
More than 1 Lonsec Research Rating. Shortened Digital Format Version	<code></code>	Example HTML code.
Lonsec Research Logo. Shortened Digital Format Version	<code></code>	Example HTML code.
Lonsec Research Award. Shortened Digital Format Version.	<code></code>	Example HTML code.

5. Available Ratings, Logos, Awards and Lonsec IP

5.1 Research Rating Logos

The following Lonsec Research Ratings are available:

- Highly Recommended
- Recommended
- Investment Grade
- Approved
- Sustainability Scores
 - 5 Bees
 - 4 Bees
 - 3 Bees

Please see available ratings images below:





Minimum size
20mm x 20mm (print)
100px x 100px (web)

5.2 5-Year Logos

The following logos are available for purchase for eligible funds:

Platinum Logo – available for funds who have received a Highly Recommended rating for each of the past 5 consecutive years.

Gold Logo – available for funds who have received a mix of a Highly Recommended OR Recommended rating for each of the past 5 consecutive years.

Silver Logo – available for funds that have received a Recommended rating for each of the past 5 consecutive years.

Lonsec Research will provide you with your copy of your logo which will include your fund's name upon purchase.

Please see available logos images below:



*Figure 1: Example Gold Logo
ABC Managed Fund*

5.3 Awards

Momentum Media (through Money Management) owns and manages all event logistics including Award distribution, physical trophies on the night, as well as sending the winner seals via email to all winners following the event. Awards categories can change from year to year and are finalised prior to the Fund of the Year Awards. For more information, please refer to the following sites:

<https://www.fundmanageroftheyear.com.au/awards/how-to-submit-your-awards-application>

<https://www.fundmanageroftheyear.com.au/awards/group-category-methodology>

5.4 Lonsec IP

The Lonsec trademark below must accompany any Lonsec rating, logo, award or use of any Lonsec IP (i.e. when referencing the Lonsec brand or name).

Lonsec

Lonsec

Colour details

CMYK: C 75 M 68 Y 67 K 90

RGB: R 30 G 30 B 30

6. Support is available

If you have any questions about how best to display and publish your rating, Award or Logos or how you use Lonsec (IP), please contact us by calling 1300 826 395, or via email at research.publishing@lonsec.com.au.