



Publication Standards

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

30 January 2023

Contents

- 1. Introduction 3
 - 1.1 Congratulations..... 3
 - 1.2 Requesting Approval 3
 - 1.3 Important information 3
- 2. Displaying your rating and award logos..... 4
 - 2.1 Ratings and Awards Logo Formats 4
 - 2.2 Lonsec Research Rating and Sustainability Score logos 4
 - 2.3 Exclusion zones 5
 - 2.4 Lonsec awards..... 5
- 3. Promoting your rating or award 6
 - 3.1 General information 6
 - 3.2 Lonsec Research Ratings & Reports..... 6
 - 3.3 Awards..... 7
 - 3.4 Social Media 7
- 4. Disclaimers to accompany ratings and awards..... 8
 - 4.1 Disclaimer requirements 8
 - 4.2 Lonsec Research disclaimers..... 8
 - 4.3 Digital disclaimer alternatives 9

1. Introduction

1.1 Congratulations

Congratulations on receiving your rating or award! We encourage all recipients to promote their achievements by displaying their rating or award logo prominently on their website, marketing material, media releases, digital communications, and other collateral.

These requirements help you get the most out of your rating or award while adhering to Lonsec's disclaimer requirements and our brand rules.

If you have any questions about how best to display and publish your rating or award logos, please contact us by calling **1300 826 395**, or via email at:

Lonsec Research: research.publishing@lonsec.com.au

1.2 Requesting Approval

Please submit a final version of any form of promotional or marketing material that refers to a Lonsec rating or award to ensure that it complies with Lonsec's legal obligations and brand guidelines.

Unauthorised use of fund review reports, ratings or award logos, using an incorrect disclaimer, or any other misuse of Lonsec's intellectual property, may lead to immediate and final withdrawal of your rating or award.

To request approval, please send a final version of your material to:

Lonsec Research: 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).

These standards form part of the Lonsec Master Services Agreement - General Terms, the Lonsec Research Review and Rating Agreement.

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

2. Displaying your rating and award logos

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 ratings and awards, please adhere to these standards and requirements at all times when displaying or using the ratings or awards logos, including using the correct size, colours and resolution, and ensuring adequate space surrounds them.

2.1 Ratings and Awards Logo Formats

Funds that receive a rating or award from Lonsec can request a logo file with a range of formats for use in their own marketing and promotional materials. When selecting a logo 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 logo is to be used in any printed format – brochures, posters, advertising, the logo 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 logo is to be used in any web-based media the logo 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 logo is to be used in any Microsoft Office applications, e.g. Word and PowerPoint, the logo 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.

2.2 Lonsec Research Rating and Sustainability Score logos

When displaying our icons on your fund website, each icon must actively link to the Lonsec website when clicked.

The Lonsec Research domain name is as follows: <https://www.lonsec.com.au>



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



2.3 Exclusion zones

When publishing the Lonsec wordmark or a rating logo, please ensure that there is an exclusion zone around them. An example is included below showing an adequate amount of space for both the Lonsec wordmark and a rating logo, which is included in the logo files provided.



2.4 Lonsec awards

The Lonsec logo must accompany all Lonsec awards and be placed before the award icon.

Lonsec

Colour details

CMYK: C 75 M 68 Y 67 K 90

RGB: R 30 G 30 B 30



3. Promoting your rating or award

Our ratings and awards are designed for use in promotional and marketing material to clearly communicate the value of your fund or investment product. We encourage recipients to actively use the logos across all marketing and promotional channels.

To ensure that our logos remain a trusted and reliable indicator of your fund's value, please adhere to the following rules when using the rating and logos information.

3.1 General information

- The appropriate disclaimer **must be** displayed along with the rating or award information. See Section 5 below, 'Disclaimers to accompany ratings and awards', for more information.
- The final version of promotional or marketing material that refers to a Lonsec rating or award **must be** approved by Lonsec, as noted in section 1.1.
- Each fund is responsible for the preparation, creation of, and any costs associated with, promotional material incorporating Lonsec ratings and awards logos. Each fund is responsible for the wording and description of their achievements and may only refer to Lonsec or Lonsec Research with our approval.

3.2 Lonsec Research Ratings & Reports

- The rating and report **must be** the latest available and include any updates or revisions. 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) and update as applicable.
- Expired ratings and fund review reports **must not** be used or accessible via your website or other channels.
- Ratings and fund review reports typically 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).

- Rating recipients may provide copies of ratings reports to confirmed holders of an Australian Financial Services License, their representatives or authorised representatives on express request.
- When displaying rating logos on your fund website, each logo must actively link to the Lonsec Research site when clicked.
- The Lonsec Research domain name is as follows: <https://www.lonsec.com.au>.
- The Fund may only display the Research Report on its website if access to the Research Report is restricted by one of the following means:
 - the Research Report is placed in a password-protected section of the website designated for financial advisers;
 - an email link is provided for the financial adviser to request a copy of the Research Report, which is not displayed on the website;
 - a pop-up dialog box requests the user to confirm their status as a financial adviser; or
 - another access method approved by Lonsec in writing.
- Rating recipients may wish to include extracts from the associated fund review to emphasize the reasons behind the rating. If you wish to refer to the report, please use direct, unedited quotations and indicate that these are quoted from the text of the report.
- Funds may not paraphrase, generalise comments or opinions, or modify the text in a way that changes the reader's impression of the fund and rating.
- All extracts and references to ratings or reports must be submitted to Lonsec for approval.

3.3 Awards

- Lonsec Research award logos may be used on an ongoing basis provided they are accompanied by a current rating logo. 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.
- When displaying award logos on your fund website, each award logo must actively link to the Lonsec site when clicked.
- The Lonsec domain name is as follows: <https://www.lonsec.com.au>.
- All award use or references must be submitted to Lonsec for approval.

3.4 Social Media

- You may disclose the contents of the Research Reports, Rating Logos, Ratings and Awards on any form of social media, such as LinkedIn, Twitter etc.
- The use of social media must adhere to the information listed in Part 4.1, 4.2 & 4.3 of these standards. Additionally, retweeting news articles or other posts must be from the Fund Manager's account, not from personal social media accounts.
- The disclaimer **must be** present on social media platforms however, in lieu of displaying the entire disclaimer a link to the disclaimer can be present as per below:

Click here for important information about this rating: <https://www.lonsec.com.au/logo-disclosure>

- All social media use must be submitted to Lonsec for approval **before** the post is live.

4. Disclaimers to accompany ratings and awards

An appropriate disclaimer must be shown when using a rating, award logo or information from a Lonsec fund review. The disclaimer you use will depend on the logos used, and in the case of a Lonsec rating, whether you choose to include an extract from the Lonsec fund review report.

4.1 Disclaimer requirements

- Disclaimers must be displayed in a minimum size 8 font and clearly associated with the rating, award or fund review report extract.
- The text must be reproduced in full without alteration and include the date of publication of the relevant rating.
- Lonsec disclaimers must not be combined with any other disclaimers.
- A single disclaimer may be used for more than one fund provided the rating assignment and dates for each fund must be clearly displayed. This can be done either by using the APIR codes or the full names of the funds.

4.2 Lonsec Research disclaimers

- For use of the Lonsec Research rating logo, or an extract from the fund review report (with or without the rating logo), the following disclaimer must be displayed. For digital media please ensure the text Lonsec Research Pty Ltd contains a hyperlink to www.lonsec.com.au.

The rating issued MM/XXXX is published by [Lonsec Research Pty Ltd](http://www.lonsec.com.au) ABN 11 151 658 561 AFSL 421 445 (Lonsec). Ratings are general advice only, and have been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. 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 assumes no obligation to update. Lonsec uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2023 Lonsec. All rights reserved.

- For more than one Lonsec Research rating logo, the following disclaimer must be displayed, and the name of the product or APIR and report date should be repeated as required for each rating logo published. For digital media please ensure the text Lonsec

Research Pty Ltd contains a hyperlink to www.lonsec.com.au.

The rating issued <MM/XXXX> <APIR or Name>, <MM/XXXX> <APIR or Name> are published by **Lonsec Research Pty Ltd** ABN 11 151 658 561 AFSL 421 445 (Lonsec). Ratings are general advice only, and have been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, read the product disclosure statement and seek independent financial advice before investing. 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 assumes no obligation to update. Lonsec uses objective criteria and receives a fee from the Fund Manager. Visit lonsec.com.au for ratings information and to access the full report. © 2023 Lonsec. All rights reserved.

4.3 Digital disclaimer alternatives

- When promoting a rating in a digital format, an alternative to publishing the full disclaimer below the rating logo is to add preview text (sometimes known as hover text) to the image. The preview text invites users to “Click here for important information about this rating”. An example of how this can be included into the HTML code of your website is included below.

```
<a href="https://www.lonsec.com.au/logo-disclosure"></a>
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- The preview text must link to the relevant disclaimer page: www.lonsec.com.au/logo-disclosure.
- Another alternative is to add the below under the rating logo:

Click here for important information about this rating: <https://www.lonsec.com.au/logo-disclosure>

- 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.
- 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.