

Media Release

Franklin Templeton launches its first alternatives fund for Australian investors.

-SQM Research awards the new alternatives fund 'Superior' rating

Sydney, August 15, 2023: [Franklin Templeton](#), a global investment manager, is improving access to alternative investment opportunities for Australian retail investors with the launch of its first alternatives fund to the market - the **Franklin K2 Athena Fund**.

The fund invests in predominantly uncorrelated risk premia strategies across multiple asset classes including equities, fixed income, and currencies.

The Franklin K2 Athena Fund received a 'Superior' rating from SQM Research, which puts it in the High Investment Grade category.

In the ratings report, SQM noted the Fund's market-neutral orientation, making it suitable for defensive purposes. Since its inception in 2021, the investment strategy has exhibited a strong negative correlation to equities.

They also commended the fund's thorough investment process and credited the investment team 'with clear responsibility and accountability.'

Franklin Templeton's Managing Director and Head of Australia and New Zealand, Felicity Walsh, said she was pleased with the recognition of the strategy's strong performance.

"It is not surprising that as investors seek to address today's major issues, including inflation, achieving desired levels of growth, and effectively dealing with an uncertain world, they are increasingly turning to alternative asset classes to improve their investment outcomes.

"We chose to bring this fund to market to provide access for Australian investors to this investment capability that provides daily liquidity and is cost effective. Both these features are key drivers for our clients," she added.

Given the cash-rich nature of the portfolio, the Fund is well positioned to take advantage of the tailwinds from a higher interest rate environment.

Franklin Templeton is one of the biggest and most diversified alternative asset managers in the world. It has approximately US\$260 billion in alternatives strategies managed by a growing range of specialist fund managers.

Franklin Templeton acquired the manager of the new fund, K2 Advisors, in 2012. K2 Advisors was founded in 1994 and manages funds in the alternatives asset class, focusing on hedge fund strategies. It seeks to generate returns independent of economic conditions while measuring, monitoring, and managing risk.

"At Franklin Templeton, we offer the scale, experience, resources, and choice needed to meet increased demand for alternatives. Our firm's specialist managers offer opportunities to diversify exposures, manage risk, improve liquidity and enhance income in public and private markets.

"They have a focus on research-driven innovation and exploration of new segments," Walsh said.

This year the strategy, also available as a UCITS Fund, was awarded the best 'Alternative Risk Premia Best Performing Fund' by the Hedge Fund Journal. *

Learn more about the Franklin K2 Athena Fund [here](#)

Sources

*<https://thehedgefundjournal.com/2023-ucits-hedge-awards/>

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About Franklin Templeton

Franklin Resources, Inc. [NYSE:BEN] is a global investment management organization with subsidiaries operating as Franklin Templeton and serving clients in over 155 countries. Franklin Templeton's mission is to help clients achieve better outcomes through investment management expertise, wealth management and technology solutions. Through its specialist investment managers, the company offers specialisation on a global scale, bringing extensive capabilities in fixed income, equity, alternatives and multi-asset solutions. With offices in more than 30 countries and approximately 1,250 investment professionals, the California-based company has over 75 years of investment experience and approximately AUD\$2.1 trillion in assets under management as of June 30 2023.

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other professional advice before making an investment decision.

Please read the relevant Product Disclosure Statements (PDSs) and any associated reference documents before making an investment decision. In accordance with the Design and Distribution Obligations and Product Interventions Powers requirements, we maintain Target Market Determinations (TMD) for each of our Funds. All documents can be found via www.franklintempleton.com.au or by calling 1800 673 776. Franklin Templeton Australia Limited as Responsible Entity has appointed K2/D&S Management Co., L.L.C. (“K2 Advisors”) as the fund manager of the Franklin K2 Athena Fund (ARSN 664 862 819).

Issued by Franklin Templeton Australia Limited (ABN 76 004 835 849, AFSL 240827).

LinkedIn Social Media Post

Post copy:

We are excited to share Franklin Templeton recently launched our first retail #Alternatives fund for investors – Franklin K2 Athena Fund – and was awarded a ‘Superior’ rating by SQM research. Learn more about the strategy and why we chose to bring it to market:

Image:

(Refer to below example. Will update with quote and headshot of Flick)

“Our firm’s specialist managers offer opportunities to diversify exposures, manage risk, improve liquidity and enhance income in public and private markets.”

- Felicity Walsh, Managing Director, Australia and New Zealand



“**Our firm’s specialist managers offer opportunities to diversify exposures, manage risk, improve liquidity and enhance income in public and private markets.**”

Felicity Walsh,
Managing Director, Australia and New Zealand

Link: (to this press release once on the FT website)