

Invesco launches systematic, multi-factor global equity fund for Australian investors

Australia, 11 June 2026: Invesco, a leading global asset management firm, announced the launch of the Invesco Global Enhanced Equity Fund (the Fund), providing Australian investors access to a systematic global equity strategy with a 20-year track record and more than AU\$16 billion in assets under management globally (as at 31 March 2026).

Managed by Invesco Quantitative Strategies (IQS), the Fund draws on more than 40 years of experience in systematic and factor-based investing, underpinned by proprietary research and implementation expertise.

The actively managed Fund aims to deliver 1.0% p.a., before fees, above the MSCI World ex-Australia Index, with a targeted tracking error of 1.5% to 2.0% p.a. It invests in a diversified portfolio of 400 to 550 global companies using a systematic, multi-factor approach designed to capture value, momentum and quality signals within a tightly controlled risk framework.

Since inception on 31 July 2005, the strategy has delivered 1.3% p.a. above the MSCI World ex-Australia Index, including 5.3% alpha in the 12 months to 31 March 2026 (AUD terms, gross of fees).

Jonathon Crook, Managing Director, Head of Australia and New Zealand, said:

“Australian investors are increasingly looking for solutions that combine the alpha potential of active investing, with the risk management of a tracking error constrained, systematic process. In a market environment where returns have been increasingly concentrated in a narrow group of stocks, finding alpha through a diversified and disciplined process becomes even more important. This Fund is designed to meet that need by offering a transparent and repeatable approach to global equities, backed by Invesco’s global scale, research capability and long heritage in systematic investing.”

Scott Bennett, Director, Invesco Solutions, said: “Our aim is to generate alpha through a repeatable process without taking on unrewarded risk. While many systematic approaches rely on similar optimisation tools and techniques that can lead to herding, our approach focuses on preserving factor diversification and improving the alignment between signals and holdings, reducing crowding and commonality amongst positions. Having managed this strategy for over two decades, IQS has a proven track record of delivering attractive risk-adjusted returns while maintaining tracking error within the targeted range. We believe this reflects the strength and consistency of the underlying investment process.”

The Fund was awarded a ‘Recommended’ rating by Zenith Investment Partners following its inception on 10 June 2026. More information on the Invesco Global Enhanced Equity Fund is available on the Invesco website at www.invesco.com/au.



PRESS RELEASE
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About Invesco Ltd.:

Invesco Ltd. is one of the world's leading asset management firms serving clients in more than 120 countries. With US\$2.2 trillion in assets under management as of March 31, 2026, we deliver a comprehensive range of investment capabilities across public, private, active, and passive. Our collaborative mindset, breadth of solutions and global scale mean we're well positioned to help retail and institutional investors rethink challenges and find new possibilities for success. For more information, visit www.invesco.com/au.

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