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ACN: 169 154 858



14 September 2022

Company Announcements  
Australian Securities Exchange Limited  
Exchange Centre  
20 Bridge Street  
Sydney NSW 2000

## **Anton Tagliaferro to retire as co-portfolio manager of the QVE portfolio in 2023**

The Board of QV Equities (the 'Company' or 'QVE') advises that Anton Tagliaferro, co-portfolio manager of the QVE portfolio will transition his portfolio management responsibilities for the QVE portfolio to Simon Conn and Marc Whittaker during March 2023, which coincides with Anton's announced retirement from Investors Mutual Limited (IML).

Simon Conn, who has managed the QVE portfolio since its inception in August 2014, will continue as portfolio manager. Marc Whittaker, CFA, will be appointed as QVE co-portfolio manager to work alongside Simon.

Marc is an experienced portfolio manager who has worked in Australian equities since commencing his career in 1999. He joined Investors Mutual Limited (IML) in 2016 and is also co-Portfolio Manager for IML's Future Leaders and Private Portfolio Funds. Marc also has extensive experience in analysing companies in various small and mid-cap sectors including Health Care, Consumer Staples and Industrials.

Commenting briefly on his decision, Anton said "I believe that now is the right time to start handing over management of the QVE portfolio to Simon and Marc. I know I will leave the QVE portfolio in safe hands with every confidence in Simon and Marc's ability to generate healthy returns and a reliable income stream moving forward."

Commenting on the transition Chairman Peter McKillop said: "I would like to thank Anton for managing the QV Equities investment portfolio with Simon over the past eight years, as well as his contribution as a Director. He has always had the shareholders' best interests at the front of his mind and been very focused on seeking to ensure that the Company delivered reasonable returns and paid consistent levels of franked dividends in what have been extremely volatile investment times.

"I am also delighted to welcome Marc Whittaker as co-portfolio manager and I am sure he will work well alongside Simon Conn. Marc's knowledge and enthusiasm for investing in the mid to small cap area of the Australian sharemarket is evident to anyone who has met him. Marc will join Simon and Anton at the investor update following our upcoming AGM."

Anton remains a Director on the QV Equities Board.

*Authorised for release by the Board of QV Equities Limited*

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## Annual General Meeting

Join the QVE Board for the Company's Annual General Meeting.

Following the formal AGM proceedings, Anton Tagliaferro, IML Investment Director and Simon Conn, IML Senior Portfolio Manager will provide an Investor update covering the companies held in the QVE portfolio and its positioning looking forward.

**Date:** Wednesday 26 October 2022

**Time:** 10am

**Location:** Radisson Blu Plaza Hotel Sydney, The Press Room

27 O'Connell Street, Sydney, NSW 2000

Register [here](#)

## QVE investor update webinar

The portfolio managers will also present an update via webinar for those who can't make it in person.

**Date:** Thursday 27 October 2022

**Time:** 11-11.45am (AEDT)

Register [here](#)

*QV Equities (ASX: QVE) was listed in 2014 with the objective of providing shareholders with a portfolio of companies that sit outside the top 20 of the Australian Stock Exchange, selected by Investors Mutual based on their 'quality and value' investment philosophy.*

*The QVE portfolio aims to deliver consistent returns to investors over time through the growth of the underlying net tangible assets (NTA) of the company and through the provision of a consistent and growing fully franked dividend over time.*