

## Wealth Service Expands under a new Corporate Authorised Representative Licencing Agreement

2<sup>nd</sup> December 2024

Equity Story Group Ltd (Equity Story or Company, ASX: EQS) is pleased to announce that it has finalised the agreement to transfer to Baker Young Limited as its licensee for Equity Story Securities (**EQS Securities**). This change of license for EQS Securities will enable the delivery of a broader range of wealth service solutions.

### Highlights

- Dedicated and experienced broker resource
- Simplified access to floats, placements and ASX transactions
- Access to Baker Young's Individually Managed Portfolio Platform (for qualified investors)
- Leveraging on 40 years of experience in the Australian stock market
- Resolution of current client Wealth Management issues
- Streamlined new client establishment process

Equity Story's Board and CEO strongly believe that developing a Wealth Management capability benefits members, followers, and shareholders. Although the previous implementation of Portfolio Services may have failed to meet our expectations, our belief in the overall strategy has not wavered.

Equity Story's arrangement with Baker Young Limited will enable our members and followers to access leading broking services through Baker Young's platforms and experience. The arrangement ensures an experienced, dedicated broker resource and simplified access to Floats, Placements, ASX transactions, and Baker Young's Individual Managed Portfolio Service.

**Shane White, CEO of Equity Story, said,** *"Our Founder, David Tildesley, started Equity Story to help investors. The long-proven CTM methodology is the leading investing*

*strategy. Recognising that investors are often time-poor, the Founders also established the strongly performing Equity Story Growth Fund as another investor solution.*

*With this licencing agreement and access to Baker Young's expertise, we can now offer a further investment option for our sophisticated and wholesale investors: an individually managed portfolio (IMP) solution that focuses on the ASX100, 200, and 300 and supports a broader group of investors with different investment needs.*

*We recognise that investing is not a one-size-fits-all proposition, and having a range of offerings allows our members to enjoy the flexibility of tailoring a solution for their specific needs or investment appetite.*

*In working together, we see a powerhouse combination of our proprietary CTM platform methodology with Baker Young's 40 years of fundamental analysis and broking skills in managing individual portfolio's."*

Our wealth service members and followers will transition to Baker Young Limited over the coming months. The initial phase will focus on wholesale clients, while the transition for retail clients is expected to commence in Q1 2025.

Apart from the additional wealth service offerings, the licencing agreement also extends to Equity Story and its members several additional benefits including simplified distribution of corporate actions, enhanced compliance and paperwork support for Lead and Joint Lead management roles, improved mandate processes, DVP settlement of deals, and Optimized Offer and Acceptance management.

The Company expects this licensing agreement to significantly enhance its operational efficiency, improve client service, and drive revenue growth.

### **Corporate Enquiries**

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### **About Equity Story Group Ltd**

Equity Story Group Ltd (ASX: EQS) is an Australian investor media company providing stock market trading information, wealth advice, research, investor education, funds management and capital markets services.

The Company's subscribers pay annual membership fees for written content and podcast-based equities market advice and commentary through several subscription packages, as well as regular paid live and digital investor education courses.

The Company offers other adjacent financial services to its members including member access to corporate investment opportunities, funds management and additional financial services and content.

For more information, please visit us: [www.equitystory.com.au](http://www.equitystory.com.au)

