



**UBS Asset Management  
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## Notice of change of Portfolio Manager

**Date: 15 May 2024**

This notice is to advise the following **Portfolio Manager change** on selected UBS Australia Investment Multi-Asset Funds, effective 15 May 2024.

Impacted Funds:

Fund name	Current Portfolio Managers	New Portfolio Managers as of May 15, 2024
UBS Balanced Investment Fund (ARSN: 090 430 210)	Hayden Briscoe, Jade Fu, Nicole Goldberger	Jade Fu, Nicole Goldberger
UBS Defensive Investment Fund (ARSN: 090 430 881)	Hayden Briscoe, Jade Fu, Nicole Goldberger	Jade Fu, Nicole Goldberger

**Nicole Goldberger** is the Global Head of Multi-Asset Portfolios and will continue to work closely with **Jade Fude** as the co-portfolio manager of the Australian Multi-Asset Funds.

There will be no changes to the investment process. We continue to adopt a team-based approach, with Jade and Nicole dedicated to ensuring the robustness of our investment process and delivery of investment outcome.

They will continue to leverage the firm's global resources, including but not limited to portfolio management, macro, risk and analytics.

**Contact information.**

If you require any further information relating to the changes outlined in this letter, please contact your adviser or call Client Services on (02) 9324 3034 or toll free on 1800 075 218 between 9:00 am and 5:00 pm (Sydney time) Monday to Friday.

Kind regards

Glen Rice  
Head of Product  
UBS Asset Management (Australia) Ltd