



## LAUNCH OF EAST 72 DYNASTY TRUST

East 72 Holdings (E72) is pleased to announce the establishment of a new managed fund, available to wholesale investors primarily focused on investing in global companies with controlling family shareholders.

The new fund, East 72 Dynasty Trust, has been created to utilise East 72's expertise in analysing these types of companies, and the attributes of these businesses in producing significant returns over long periods.

Past research<sup>1</sup> has shown that by using a proprietorial approach, these types of companies adopt longer term strategic plans and holding periods, operate with lower cost structures, retain their talent for longer periods, and tend to have more diverse, global operations.

In its principal portfolio, E72 owns (or has owned) companies which fit many of these characteristics such as Exor NV, HAL Trust, Bolloré, Amerco, CK Hutchison, Porsche Automobil Holding/Volkswagen, Berkshire Hathaway and LVMH. Apart from well-known examples of these types of companies in USA and Europe, there are significant numbers of listed companies which fit these characteristics across the Asian region.

East 72 Dynasty Trust will be managed by a newly created subsidiary, East 72 Management Pty Ltd which is a Corporate Authorised Representative of Westferry Operations P/L (AFSL 302802). Westferry is operated by Peter Johns, a Director of E72. The Executive Chair of E72, Andrew Brown, is the Responsible Manager for the AFSL. This structure enables E72 to establish the new operation at extremely low cost.

E72 will be marketing East 72 Dynasty Trust to interested parties from early December and more actively in the first quarter of 2023. As a wholesale fund, to qualified applicants, the minimum investment will be \$50,000. East 72 Dynasty Trust is a long only fund, with no gearing designed to benefit from the attributes displayed by the investee companies themselves.

We are excited to put forward this first external money management initiative, the basis for which is in keeping with the culture and ethos of East 72 itself.

### For further information:

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<sup>1</sup> Samples include:

(2022) Stiftung Familienunternehmen (ed.): Listed Family Firms in Europe – Relevance, Characteristics and Performance, prepared by Assoc. Prof. Aleksandra Gregoric<sup>ˆ</sup>, Ph.D., Prof. Dr. Marc Steffen Rapp, Assoc. Prof. Ignacio Requejo, Ph.D., Munich 2022, [www.familienunternehmen.de/en](http://www.familienunternehmen.de/en)  
(2012) "What you can learn from family business" Harvard Business Review Kachaner, Stalk Jr and Bloch