

Infinity Methodology

Our Approach

SuperRatings Infinity Methodology aims to recognise the Australian superannuation funds leading the industry in sustainable behaviour by rewarding the funds that practice genuine responsible investment principles and openly communicate these processes with fund members. To be considered, these funds must also have sound internal sustainability practices underpinning their responsible investment practices.



Award Structure

Based on our assessment criteria, funds are allocated a score and have the opportunity to receive either an Infinity Award or Infinity Recognised rating. The fund that receives the highest score will win the Infinity Award. In addition, the group of funds that rank the highest will also receive an Infinity Recognised rating. Any fund that is acknowledged must demonstrate excellent behaviour in each of the three assessment criteria: Behaviour, Engagement and Investment.

Assessment Criteria

The methodology incorporates three assessment components being, Behaviour, Engagement and Investment. These are then reviewed quantitatively and qualitatively to determine the Infinity Award Winner & Infinity Recognised Funds.

Behaviour		25%
Attitudes and Behaviour	Climate Change Risk	
Carbon Output & Reporting	Internal Practices & Policies	
Engagement		30%
Education	Member Engagement	
Interaction with Service Providers	Participation in Group Initiatives	
Investment		30%
Investment Approach	Investment Options	
Investment Considerations	Implementation	
Qualitative Overlay		15%
Transparency	Evidence of Measurement & Reporting	
Influence		

About SuperRatings This information sheet is issued by SuperRatings Pty Ltd ABN: 95 100 192 283 AFSL 311800. SuperRatings is a superannuation research house with specialist areas of expertise, that was originally established in 2002. From 1 July 2011, SuperRatings became a fully owned subsidiary of the entity currently registered as Lonsec Holdings Pty Ltd ABN: 41 151 235 406, a privately owned entity with a multi-brand strategy of providing leading financial services research and investment execution. SuperRatings believes that professional financial advisers need informed opinions on the best superannuation and pension financial products to provide real value for their clients. To meet this need, SuperRatings has in place an experienced research team, which draws on a robust research process to undertake in-depth assessment of superannuation financial products. No fees are paid by superannuation and pension funds to SuperRatings for reviewing and rating superannuation and pension financial products. **Warnings:** Past performance is not a reliable indicator of future performance. Any express or implied rating or advice presented in this publication is limited to "General Advice" (as defined in the Corporations Act 2001(Cth)) and based solely on consideration of the merits of the superannuation financial product(s) alone, without taking into account the objectives, financial situation and particular needs ("financial circumstances") of any particular person. Before making an investment decision based on the rating(s) or advice, the reader must consider whether it is personally appropriate in light of his or her financial circumstances, or should seek independent financial advice on its appropriateness. If SuperRatings' advice relates to the acquisition or possible acquisition of particular financial product(s), the reader should obtain and consider the Product Disclosure Statement for each superannuation financial product before making any decision about whether to acquire a financial product. SuperRatings research process relies upon the participation of the superannuation fund or product issuer(s). Should the superannuation fund or product issuer(s) no longer be an active participant in SuperRatings' research process, SuperRatings reserves the right to withdraw the rating and document at any time and discontinue future coverage of the superannuation and pension financial product(s). **Copyright Disclaimer** Copyright © 2017 SuperRatings Pty Ltd (ABN: 95 100 192 283 AFSL 311800 (SuperRatings)). This web-site is subject to copyright of SuperRatings. Except for the temporary copy held in a computer's cache and a single permanent copy for your personal reference or other than as permitted under the Copyright Act 1968 (Cth.), no part of this web-site may, in any form or by any means (electronic, mechanical, micro-copying, photocopying, recording or otherwise), be reproduced, stored or transmitted without the prior written permission of SuperRatings. This web-site may also contain third party supplied material that is subject to copyright. Any such material is the intellectual property of that third party or its content providers. The same restrictions applying above to SuperRatings copyrighted material, applies to such third party content.