How Perpetual approaches small cap alpha

By Perpetual Asset Management
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Co-portfolio managers ALEX PATTEN and JAMES RUTLEDGE explain why small and microcap investing can offer meaningful alpha, but only with a disciplined, selective approach.

The team's bottom-up, value-oriented process results in portfolios that look very different from peers and helps manage the higher risks inherent in small caps.

Find out where their focus lies and how they navigate volatile, uncertain markets.

Learn more about Perpetual Smaller Companies Fund

About Perpetual's Australian small and micro-cap equities team

Alex Patten and James Rutledge are co-portfolio managers of Perpetual Smaller Companies Fund and Perpetual Pure Microcap Fund.

Perpetual is a pioneer in Australian quality and value investing, with a heritage dating back to 1886.

We are one of Australia's most respected and longstanding active investment managers, with a proven investment process that has been refined through more than 50 years of experience.

We have a track record of contributing value through "active ownership" and deep research.

Want to find out more? Contact a Perpetual account manager



Alex Patten

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James Rutledge

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