

Lakehouse Capital announces Investment Team appointment

2 February 2022

Lakehouse Capital has strengthened its Investment Team with the appointment of Jay Chiu as Investment Analyst. Jay has extensive global investment experience and will join the existing Investment Team of six based in Sydney.

Jay joins Lakehouse Capital after spending 5+ years with CITIC CLSA across Asia-Pacific as an Equities Portfolio Analyst. Prior to that, Jay gained experience with HSBC (in Hong Kong & the United Kingdom) and Goldman Sachs (United Kingdom) in equities, risk, portfolio management and technology positions. Originally from Sydney, Jay studied at the University of NSW where he gained both a Masters (Commerce, finance) and Bachelor (Engineering, software) degrees. Jay is based in Lakehouse's Sydney office reporting to Chief Investment Officer Donny Buchanan.

Commenting on the appointments, Donny Buchanan, CIO and co-founder of Lakehouse Capital, said:

"I am delighted that Jay is joining the Lakehouse team. We already have a successful and experienced investment team of six managing our Australian Small Cap and Global Growth strategies. The addition of Jay will further bolster our research efforts and provide additional cross coverage and support for both strategies. We were humbled to have over 100 applicants for the position demonstrating a broad base of experience and backgrounds. Jay, however, was a standout in terms of his diverse experience, both overseas and in Australia, and the alignment of his investment philosophy to seek long-term, high quality, growth companies. We look forward to adding Jay's ideas and perspectives to the team, and continuing to grow both our clients' investments and the Lakehouse business."

Jay commented on his appointment:

"Lakehouse has a distinct and disciplined approach to investing that highly resonates with me. I see this as a great opportunity to further develop my career, passion, and investment knowledge in a growing and successful business. I look forward to working with my new colleagues, contributing to the investment returns for our clients and adding value to the research process by bringing a diverse perspective and experience gained overseas."

Notes:

Lakehouse Capital was formed in 2016 by co-founders Joe Magyer and Donny Buchanan.

Lakehouse Capital is wholly owned by The Motley Fool Australia, a subsidiary of its global parent, The Motley Fool LLC.

Sydney-based with 12 employees including 7 investment managers (including Jay Chiu)

Lakehouse Capital currently offers 2 funds:

Lakehouse Small Companies Fund - launched November 2016, and

Lakehouse Global Growth Fund - launched December 2017.

Total FUM \$801.0m as at 31 December 2021.

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