



MARATHON

Marathon Purpose, Vision & Values

Our Purpose

— OUR PURPOSE

To partner with our clients and help them meet their long-term financial objectives
by outperforming stock market indices.

Our Vision

— OUR VISION

To deliver superior investment returns through the application of our distinctive capital
cycle framework in a thoughtful and sustainable way.

To act as a trusted partner for all clients.

To maintain a dedicated, inclusive and energised workforce where we act with the highest
levels of integrity in everything that we do.



MARATHON

Our Values

— OUR VALUES —

Client Focus

We work on all fronts to align our interests with those of our clients.

We are a trusted partner, privileged with the responsibility of managing client assets.

We act as a vigilant, pragmatic fiduciary, putting our clients' interests first.

Long-Termism

We take a long-term view in everything that we do.

We encourage the management of companies in which we invest in to eschew short-termism and focus on building sustainable value over the long run.

We believe it is our duty to take full account of sustainability at all stages of the investment process.

Individual Accountability

We believe in individual accountability for decision making.

Intellectual Honesty

We expect candour and humility in our conduct.

Owner Mindset

We seek to preserve an entrepreneurial and owner-oriented mindset.

We act and behave in ways that support one another, working collegiately for the benefit of our clients.

Operational Excellence

We strive for operational excellence through a restless curiosity and by employing a continuous improvement mindset.