

Global SMA portfolios provide a direct investment diversification alternative

With the Australian share market representing only 1.7%* of global share market value and being heavily weighted to the financial and mining sectors, it's vital to look beyond our shores when establishing a truly diversified equities portfolio for your clients.

By accessing larger global corporates that are not available in Australia your clients gain access to the growth opportunities not only in companies with far larger footprints but also provide some exposure to the emerging markets where they do business.

Typically, global investment options chosen for clients may include ETF's and managed funds however these tend to be more passive investments and lack transparency both in underlying holdings and in costs. Managing global investing directly yourself adds the complexity of dealing with international exchanges, custody and currency risks and even time zones.

However, as evidenced by the growing popularity of Separately Managed Accounts (SMAs), the challenges of creating a truly diversified client portfolio with direct global investments can be minimised through the use of a Global SMA, such as PPM's Global Growth Model through OneVue.

Clients access the benefits of direct ownership of an actively managed international portfolio of companies that are on major global exchanges outside Australia such as Nestle and Merck global stocks without all the hassle of international exchanges, custody providers and currency risk.



OneVue undertake all portfolio administration including dividends, corporate actions, tax record-keeping and reporting and facilitates execution, settlement and custody, eliminating much of the hassle and time required to manage an international share portfolio. Detailed online reporting enables clients and their advisers see their individual direct global holdings.

Over the past 12 months the PPM Global Equities SMA has earned 20.5% and over the past ten years has earned 11.1%pa.**



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If you're looking to provide global equities exposure for your clients please contact us at ppm@ppmfunds.com or (02)8256 3777 to learn more about the PPM Global Growth Equities SMA.

Private Portfolio Managers (PPM) is a privately owned boutique investment manager founded in 1995 with an established track record of constructing concentrated Australian and Global equity portfolios.

*ASIC as at 31/12/2018 **year to 30/4/2019 less fees

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