

PPM Australian Equities Growth SMA Holdings

30 JUNE 2026



Achieving the right balance between safeguarding investor funds and positioning their portfolios to best capture opportunities is one of the key challenges facing any financial adviser. If addressed properly, an appropriate balance between risk and reward can offer a compelling solution.

PPM's success is built around investment expertise in navigating this balance, developed and refined over 30 years of market experience.

We believe it is this time-tested expertise and capability which differentiates us from other fund managers.

PPM Australian Equities Growth SMA Portfolio

30/06/2026

	CODE	SECURITY
1	ANZ	ANZ GROUP HOLDINGS LTD
2	AUB	AUB GROUP LTD
3	CGF	CHALLENGER LTD
4	DXS	DEXUS/AU
5	DDR	DICKER DATA LTD
6	ELD	ELDERS LTD
7	HVN	HARVEY NORMAN HOLDINGS LTD
8	JHX	JAMES HARDIE INDUSTRIES-CDI
9	JBH	JB HI-FI LTD
10	ORI	ORICA LTD
11	ORG	ORIGIN ENERGY LTD
12	RDX	REDOX LTD
13	RMD	RESMED INC
14	RIO	RIO TINTO LTD
15	SCG	SCENTRE GROUP
16	SDF	STEADFAST GROUP LTD
17	VNT	VENTIA SERVICES GROUP PTY LT
18	WTC	WISETECH GLOBAL LTD
19	WOW	WOOLWORTHS GROUP LTD
20	XRO	XERO LTD

PPM in Summary

5 Investment Strategies

1. Australian Equities
2. Global Equities
3. Fixed Interest
4. Multi-Asset Growth
5. Multi-Asset Income



Aligned Interest

Our independence is our advantage: no competing priorities, no external stakeholders, just undivided focus on delivering strong risk adjusted returns and service for our clients over the long term.

1995

Established to provide a distinct investment management service to a select group of investors.

The Team



18 years average industry & 14 years average experience together at PPM.

Strong track record

8-12%*

Aiming to generate 8-12% return per annum through any investment cycle.

FUM

\$900m

Funds under management.

As at 30/06/2026. Differences due to rounding.

*See rolling 10-year returns for PPM IMA Australian and Global Equities Growth Portfolios



IMAP
MANAGED ACCOUNT
AWARD FINALIST 2019
INTERNATIONAL
EQUITIES



IMAP
MANAGED ACCOUNT
AWARD FINALIST 2022
INTERNATIONAL
EQUITIES



IMAP
MANAGED ACCOUNT
AWARD FINALIST 2024
INTERNATIONAL
EQUITIES



IMAP
MANAGED ACCOUNT
AWARD FINALIST 2023
INTERNATIONAL
EQUITIES



IMAP
MANAGED ACCOUNT
AWARD FINALIST 2025
INTERNATIONAL
EQUITIES



IMAP
MANAGED ACCOUNT
AWARD FINALIST 2026
INTERNATIONAL
EQUITIES

About PPM

Founded in 1995, Private Portfolio Managers Pty Limited (PPM), is a privately owned boutique investment manager with a well established track record of constructing concentrated Australian Equities, Global Equities and Multi-Asset portfolios for our clients and their financial advisers. Our investment objective is to grow our clients' portfolios over the long term using a disciplined & well researched investment process which seeks protection of capital with risk assessed tax effective returns. PPM offers Individually Managed Account (IMA) and Separately Managed Account (SMA) investment solutions across a number of broad investment strategies including balanced, income and growth style portfolios. For more information about PPM and our services please visit our website at www.ppmfunds.com.

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