

Portfolio diversification with consistent long-term performance – the PPM Global Equities SMA

Private Portfolio Managers (PPM) has been managing equity portfolios for over 20 years. This expertise is now available to investors with as little as \$50,000 through the PPM Global Equities SMA.

	PPM Global Equities SMA	MSCI World Index (AUD) Converted	Value Added
10 Years*	11.2%	9.9%	1.4%
5 Years*	9.8%	10.4%	-0.6%
3 Years*	11.2%	11.5%	-0.3%
1 Year*	18.4%	10.1%	8.3%

*Performance to 31st March 2019 before fees and taxes

PPM utilises a value investing philosophy in the belief that attractive long-term investment returns will be achieved by investing in companies that are financially strong, operate in an industry that has an attractive structure and are favourably priced. The philosophy can be summed up as ‘strength and value’. This philosophy has been proven over time with a long track record demonstrated in the performance figures shown above. A concentrated, high conviction portfolio of exceptional global companies works to provide consistent performance over the long term.

An attractive transparent alternative to unitised global equity managed funds, the PPM Global Equities Growth SMA provides much needed diversification for investors in

the highly concentrated Australian share market. With its direct holdings of assets, fee transparency and individual cost bases for each listed security, investors in the PPM Global Equities SMA do not incur the tax consequences as a result of other investors’ transactions or prior capital gains unlike those within a unit trust structured managed fund.

Offered through the leading platforms of Hub24, OneVue and Powerwrap, the PPM Global Equities SMA takes the hassle out of direct international investing, with the platform undertaking all execution, global custody and corporate actions whilst providing detailed consolidated reporting for clients and their advisers via online portals.

Contact us at ppm@ppmfunds.com or (02) 8256 3777 and ask about how SMA’s can work for your clients and improve your business.

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

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