PRIVATE PORTFOLIO MANAGERS

As at 31 October 2026

# Global Equities Growth SMA

## A PPM Separately Managed Account (SMA)

Private Portfolio Managers Pty Limited (PPM) is a boutique investment manager specialising in the construction and management of direct investment portfolios for long term wealth creation, with a proven performance track record since 1995.

### SMA Benefits

The PPM Global Equities Growth SMA is suitable to individual investors with a minimum initial investment of $50,000 who want to be able to access PPMs professional investment management expertise via a proven investment model.

PPM SMA investors retain the benefits of direct ownership including transparency and portability without the hassles of managing their investments directly. All portfolio administration is undertaken by the platform provider, including dividends, corporate actions, tax record-keeping and reporting. Existing investments can easily be transferred into (or out of) a PPM SMA without triggering capital gains tax consequences. Investors receive annual reporting and have online access 24/7 to the holdings of their model portfolio.

### Investor Profile

PPM's Global Equities Growth SMA is designed for clients who:

- require a model global equity portfolio
- seek long term investment growth in a tax effective manner; and
- have long-term investment horizon of at least five years and accept the risk of price fluctuations during that period.

### SMA Description

PPM Global Equities Growth SMA is an actively managed, concentrated portfolio of international equities listed on the ASX and major global exchanges (developed markets only).

The SMA is risk managed to protect investor capital and take equity positions in companies that have been identified through both a 'top down' thematic filter to identify sectors and opportunities, combined with a 'bottom up', deep research driven process to assess those companies that offer superior growth prospects over a 5 year term.

### Investment Objective & Strategy

PPM Global Equities Growth SMA investment objective is to maximise long term capital growth total return. The SMA is constructed without consideration for index weighting or other artificial constraints with a strong focus on generating returns, preserving capital and effectively managing tax outcomes.

### Model Profile

| Investments | Global equities |
|---|---|
| Minimum SMA Investment | $50,000 |
| Benchmark | MSCI World Developed |
| Investment Horizon | 5 years + with some volatility |
| Style | Active |
| Authorised Investments | International equities listed on major global exchanges |
| Asset Allocation Ranges | Global Equities: 70-98% Fixed Interest & Cash: 2-30% |
| Minimum Cash Holding | 2% |
| Number of Assets | 20-25 |
| Single security limit | 10% of portfolio |
| Derivatives | No |
| Leverage | No |
| Portfolio Turnover | <25% per annum |
| SMA Portfolio Fee (ex. GST) | Refer to PDS |
| Performance Fee | Nil |
| SMA date of inception | October 2017 |

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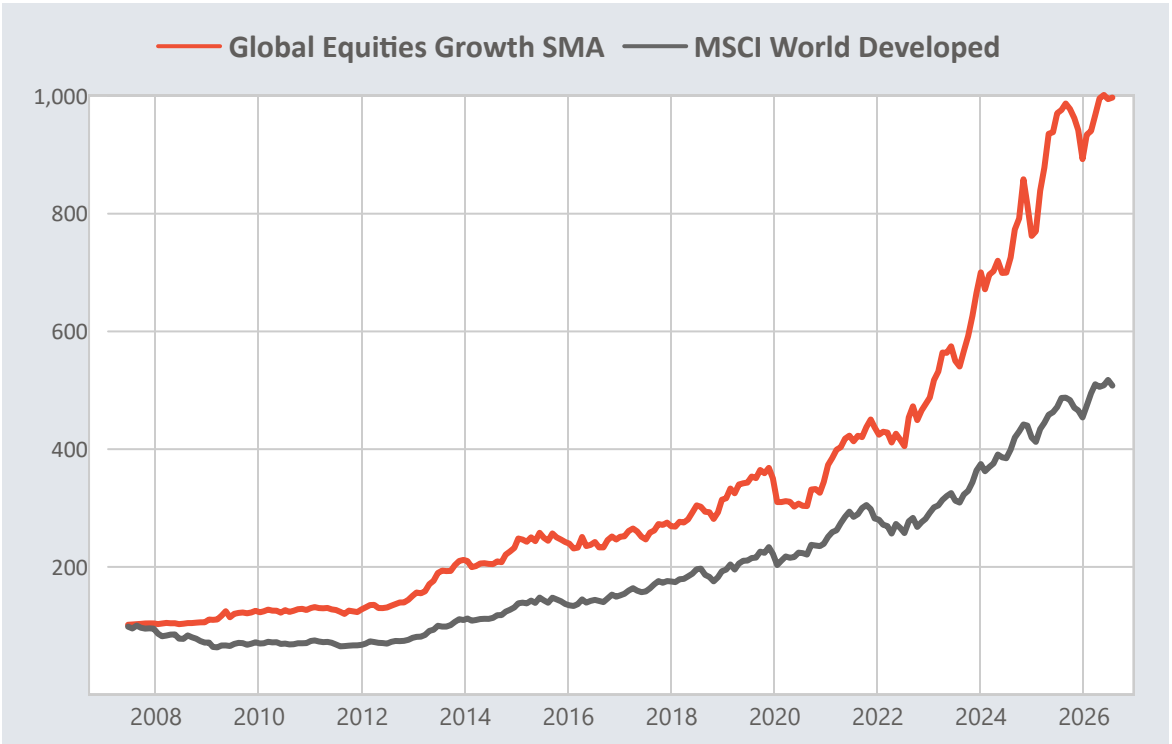
## Performance




| | Global Equities Growth SMA | MSCI World Developed | Value Added |
|---|---|---|---|
| 1 Year % | 2.16 | 4.32 | -2.16 |
| 3 Years % p.a. | 22.74 | 18.06 | 4.68 |
| 5 Years % p.a. | 18.78 | 11.95 | 6.83 |
| 10 Years % p.a. | 15.71 | 13.83 | 1.88 |
| 15 Years % p.a. | 14.90 | 14.72 | 0.18 |

*Performance returns are before fees and taxes and are based on the actual aggregate performance of the PPM Global Equities Growth Individually Managed Account (IMA) portfolios prior to the inception date of the SMA and the actual performance of the Global Equities Growth SMA from the SMA inception date.

## Asset Allocation

| | |
|---|---|
| CASH | 7.4% |
| EQUITY - GLOBAL | 92.6% |

## Sector Allocation

| | |
|---|---|
| INDUSTRIALS | 25.5% |
| CONSUMER DISCRETIONARY | 24.4% |
| CONSUMER STAPLES | 5.6% |
| HEALTHCARE | 5.8% |
| FINANCIALS | 16.3% |
| INFORMATION TECHNOLOGY | 14.1% |
| COMMUNICATION SERVICES | 8.3% |

## Research Rating

Superior

SQM RESEARCH

SQM Research Report 2026

SUPERIOR: 4.25 Stars

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## Global Equities Growth Portfolio Managers



**Hugh MacNally**
**Executive Chair**
**Portfolio Manager**



**Franklin Djohan**
**Back-up Portfolio Manager**

## How to Access a PPM SMA

HUB24 netwealth

The PPM Global Equities Growth SMA is available for financial advisers through HUB24 and Netwealth platforms. Please contact HUB24 or Netwealth directly for further information on how to obtain the relevant Product Disclosure Statement (PDS) and invest. You must obtain a copy of the relevant Product Disclosure Statement (PDS) and other relevant information. If you do not have a relationship with a financial adviser or accountant, PPM may be able to assist you locating one. Please contact us if you require further assistance.

## 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 and Global equity 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.

For investment inquiries please contact us on (02) 8256 3777

or visit our website at www.ppmfunds.com

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