

Your market-leading solution for outsourcing investment portfolio management
Praemium Separately Managed Accounts (SMAs) enable advice businesses to outsource the investment portfolio management of domestic and international portfolios and deliver great client experiences and advice business efficiencies.

SMA market leader

Praemium pioneered the provision of SMA platforms in Australia in 2005 and our international award-winning technology sets us apart from our peers.

Using this technology our SMA FUM has grown to more than \$8 billion globally and we are the largest managed account provider in Australia with the only truly integrated Managed Accounts platform.

Broad investment choice

Praemium has the broadest range of SMA model portfolios in the market with more than 350 domestic and international SMA model portfolios and 80 Investment Managers. The range of model portfolios include diversified and sector specific options which can be invested in ASX listed securities, international listed securities, Exchange Traded Products (ETPs), XTBs, hybrids, unlisted managed funds and cash. Customisation options are also available via asset locks, exclusions and substitutions or the use of the Praemium IMA.

The Praemium SMA is available for the investment of superannuation/pension, SMSF or ordinary savings enabling a tailored solution for every kind of investor, at any life stage.

Market-leading reporting

Praemium's unique integrated Managed Accounts platform can provide you and your clients with 24/7 access to our wide range of client reports with transparency across all investment holdings enhancing opportunities for high-quality client engagement.

With Report Publisher you have full control over what reports you present to your clients through their investor portal and what reports you prefer to deliver and discuss separately. Praemium's reporting is multi-layered and covers investments, tax, asset allocation, performance and other important information about your client accounts.

Time is the new currency

SMAs are more than a replacement for managed funds. The Praemium SMA and its technology provide the ability to transform your business model and create more time for high quality client engagement.

SMA model portfolios are transparent, accurate and automatically rebalanced to a defined risk profile and strategy. With Praemium's world class rebalancing technology and corporate actions management and new client consents are not required every time model portfolio holdings change.

The SMA forms part of Praemium's unique, market leading integrated Managed Accounts platform covering both custody and non-custody solutions for every kind of investor, adviser and investment.

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Giving you time to focus on what clients truly value

Praemium's integrated Managed Accounts platform offers a cost-effective outsourced solution with a range of benefits for you and your clients.



Benefits for your clients

- ✓ Access to a broad range of domestic & international SMA model portfolios with transparency of investment holdings.
- ✓ Superannuation/pension, SMSF and ordinary investment and savings solutions.
- ✓ Beneficial ownership of investments and individual tax positions.
- ✓ Flexibility to exclude, hold or substitute portfolio assets to suit personal preferences.
- ✓ Comprehensive investment, corporate actions and tax reporting through a market-leading 24/7 digital client portal.



Benefits for your business

- ✓ Outsourced investment portfolio management and administration enables more time for engagement with clients on what they truly value.
- ✓ Simple, intuitive & flexible platform that provides attractive managed account solutions for all your client segments.
- ✓ Quick and easy client implementation with digital acceptance of applications and in-specie transfer of assets.
- ✓ World class automatic model portfolio rebalancing & administration of all investments, corporate actions & tax positions.
- ✓ Access to market-leading client & business reporting covering investments, tax, asset allocation and performance.

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